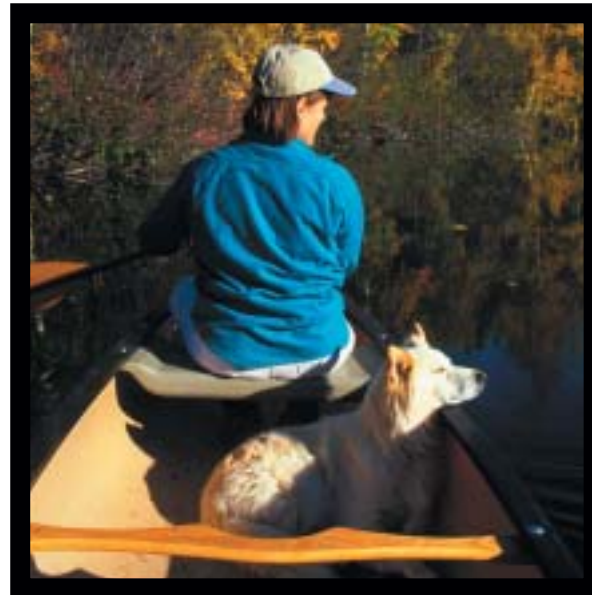


EXPLORING THE ACTIVE LIFESTYLE

An Outdoor Industry Foundation Consumer Outreach Report
January 2004 EXECUTIVE SUMMARY



Photos: Tom Bol

Prepared for Outdoor Industry Foundation by:



This Report Was Made Possible By



OutdoorRetailer

And Member Companies of Outdoor Industry Association

Background and Objectives	2
Methodology	3
Summary of Key Findings	6
■ Implications	12
Overall Marketplace	16
■ Respondent Profile	17
■ Attitudes	20
■ Past 2 Year Participation	28
■ Retail	38
■ Barriers to Participation	49
Opportunities Moving Forward	59
■ Participation Interest	60
■ Activity Lifecycle	64

Background and Objectives

Outdoor Industry Foundation (OIF) is the non-profit foundation established by Outdoor Industry Association (OIA) to support programs that increase participation in outdoor recreation and to educate the public about the economic and recreational benefits of the conservation of wild lands. OIA was founded in 1989 and provides trade services for manufacturers, distributors, suppliers, sales representatives and retailers in the outdoor industry. In its efforts to grow participation and the success of the outdoor industry, OIF commissioned Harris Interactive to conduct a consumer research study that will provide OIF with the information to develop an action plan to increase participation in human powered outdoor activities.

Specifically, this research will

- Identify and profile the current U.S. participation in human powered outdoor recreation.
- Explore the dynamics behind adoption, participation and abandonment of certain outdoor activities.
- Identify groups of the population that represent the most growth for human powered outdoor recreational activities.
- Develop strategies to help OIF effectively target and motivate key target groups that represent the highest growth opportunities.

A total of 7,682 interviews were completed online. 2,045 qualified as human powered outdoor recreational activity participants. Utilizing the Harris Interactive multimillion member online panel, interviews were conducted from October 17 to November 3, 2003.

To qualify, respondents had to meet the following criteria:

- Had to participate in one of the following outdoor recreational activities in the past two years:
 - Backpacking/Hiking
 - Camping
 - Bicycling – road
 - Bicycling – off road
 - Bird watching*
 - Cross Country/Nordic Skiing/Telemark Skiing*
 - Fly fishing*
 - Paddle Sports
 - Rafting
 - Kayaking
 - Canoeing
 - Trail running
 - Climbing
 - Snowshoeing*
 - Downhill Skiing/Snowboarding
- 16 years or older
- A U.S. resident

*Oversample participants in Bird watching, Cross country skiing/Nordic skiing/Telemark skiing, Fly fishing and Snowshoeing in order to meet the minimum sample size per activity.

The sample of qualified respondents (2,045) broke out as follows:

	<u>% of Population that participate</u>	<u>Participate</u>	<u>Favorite</u>
Backpacking/Hiking (net)	28%	1,129	362
Camping	25%	940	259
Bicycling – road	28%	1,020	262
Bicycling – off road	10%	371	116
Bird watching	5%	218	107
Cross Country/Nordic Skiing/ Telemark Skiing (net)	2%	170	52
Fly fishing	4%	185	105
Paddle Sports (net)	15%	649	329
Trail running	6%	246	80
Climbing	5%	233	74
Snowshoeing	2%	151	47
Downhill Skiing/Snowboarding (net)	7%	354	188



Select information was also collected on 5,628 non-qualifying respondents.

Weighting:

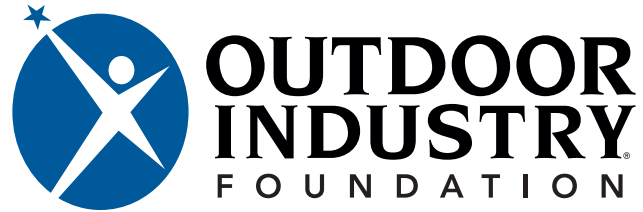
Upon completion of data collection, we balanced survey responders (qualified and non-qualified) to be representative of the U.S. on key demographics: gender, age, income, education, race/ethnicity and geographic location. This allows the final qualified sample to be the result of the screening criteria and not specified quotas.

In addition, respondent data obtained during the over sample process for individual activity participation was adjusted to its proper proportion when looking across activity participation.

The following symbols are used throughout the report:

-  Indicates significantly greater percentage at the 90% confidence level
-  Indicates significantly lower percentage at the 90% confidence level

Note: Human powered outdoor activities, for the purposes of this report, does not include walking vigorously.



Summary of Key Findings



Summary of Key Findings

1. Human Powered outdoor activities are popular and span age and gender.

- 57% of the general population participate in at least one outdoor activity.
- Participants are approximately evenly split across age and gender.

2. Participation in human powered outdoor activities is a way of life that is supported by family and friends. "People you know" is the biggest influencer in attracting new participants to an outdoor activity.

- 90% of current participants have been participating since a young age.
- 63% participate in more than one outdoor activity.
- Parent/family/friends were the biggest influence in getting the current participants started in an outdoor activity.
- 79% feel participation strengthens family relationships.

Summary of Key Findings

3. **Even though participation in outdoor activities is a way of life, there appears to be a lifecycle of participation in activities that illustrates a lull in participation on average in the participant's mid-twenties.**
 - Over half of participants have stopped their favorite activity for a period of time.
 - Level of participation significantly decreases in the 25-34 age group whether marriage and kids are involved or not.

4. **The longevity of outdoor participation is rooted not only in the functional health benefits but also in the emotional benefits of actual participation.**
 - Over three-fourths of participants agree that participating in outdoor activities gives them a feeling of accomplishment, an escape from life pressures, and a connection with themselves.
 - 63% like the physical challenge.
 - 79% are proactive about their health.

- 5. Discount stores offer participants a convenient place to shop for outdoor apparel and equipment at reasonable prices, however, this outlet is probably only used for the incidental items.**
- Over half of participants have purchased apparel and equipment at discount stores.
 - However, when it comes to high quality and reliable merchandise, participants are more likely to go to outdoor specialty shops or outdoor chain stores.
 - In addition, participants spend more at outdoor specialty shops than any other type of outlet—significantly more than at discount stores.
- 6. There are many barriers to participation in human powered outdoor activities. Whether it is starting participation, continuing participation or frequency of participation, the most prevalent barriers are time and money.**
- Top challenges for getting people to participate are being too busy (for adults) and the costs associated with gear and equipment.
 - 4 in 10 participants feel they have too many other commitments in life right now to consider outdoor activities.
 - Top reasons for permanently stopping an activity for people under the age of 44 relate to time commitments to school, children, household maintenance, etc.

7. There are many people who would be interested in OIA's outreach program.

- A quarter of those who are currently NOT participating in a human powered outdoor activity show an interest in participating in one of the activities the next 2 years.
- Approximately 8 in 10 current human powered outdoor activity participants are interested in new activities.
- As for those who have currently lapsed, this is due to time constraints rather than disinterest.

8. Hiking, bicycling on paved roads and camping are the key human powered outdoor activities that serve as an entrance to the more challenging activities.

- Hiking, bicycling on paved road and camping are the most popular and the most accessible human powered outdoor activities.
- Participants of nearly all other non-key activities also participate in one or more of the key activities.
 - Among participants of climbing, 73% bicycle, 72% hike/backpack.
 - Among participants of paddle sports, 61% hike/backpack, 54% camp.
 - Among cross country/Nordic/Telemark skiers, 71% bicycle, 74% hike/backpack, and 59% camp.

9. The youngest age group is key to building participation in human powered outdoor activities in the future.
- 16-24 year olds are already more likely to participate in human powered outdoor activities than the general population.
 - They participate in more activities than older age groups.
 - And are more frequent participators.
 - Older age groups cite injury or poor health as the barrier to participating in outdoor activities. This is a harder obstacle to overcome than prioritizing time.

1. **Invest in recruiting participants at a young age and they will be a life long participant.**

Participation in human powered outdoor activities is an ingrained behavior. Most participants start at a young age and are heavily influenced by already participating parents or close friends. Starting participants young, teaches children to love and appreciate the outdoors. The personal challenge and health benefits are what are going to keep them participating throughout their lives. Helping current participants involve their young kids earlier will facilitate the ingrained behavior.

Recruiting adults that are not currently involved may be more profitable for specialty stores at the start because they have more money to spend, but the lifestyle is not as ingrained. Therefore we believe that their commitment to outdoor participation is less and they would be more likely to lapse in the behavior.

2. **Target the human powered outdoor activities – hiking, biking and camping – that are popular, easily accessible, affordable and are entrance activities to other, less accessible activities.**

Hiking, biking and camping have stood the test of time. They have the greatest longevity of any of the human powered outdoor sports. In addition, participators in these activities are more likely to try and participate in other sports.

3. **Communicate through the local outdoor specialty stores, schools, businesses and community organizations to raise awareness of accessibility of activities and encourage participation.**

The largest barrier to participation in outdoor activities is time, even for young adults. Between their schoolwork, organizations they belong to and other school sports like soccer, basketball and football, teens and kids do not have a lot of free time. Sponsorship of events through schools or child organizations would give young participants the opportunity to try or continue human powered outdoor activities, even if their parents are too busy to be involved with them. Sponsorship will also keep the cost down for the individual participator.

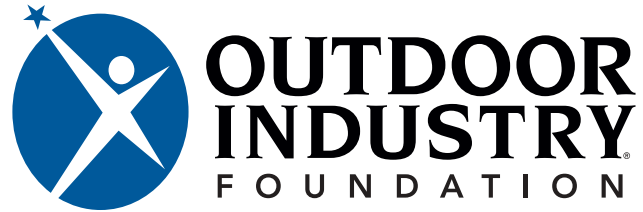
- Communicate the social aspect of the event as well as the connection with nature. Make the outings open to the entire family.
- Outdoor specialty stores can either sponsor their own events or can co-sponsor events with community organizations or schools. They can position themselves as *the expert* in the outdoor activity.

Accessibility of outdoor participation is also an issue. Raise the awareness level of all the areas in which human powered outdoor activities are available at the local level.

- Post a link or information on the city/town's website stating where the local recreational areas are and what is available at each. This information could also be included as part of the town's information packet in the "newcomers club".
- The local outdoor specialty store could also be the keeper of this information as well as current information about upcoming events. They could have an activity board posted in their store or on their website that not only posts events but posts the local recreational areas and what they have to offer.

Encourage people of all ages to participate in outdoor activities.

- Local outdoor specialty shops, as part of the community, should network to find local businesses/companies, organizations like the PTA, that would be receptive to sponsoring an outing among their constituents or an informational seminar that will create awareness of what is available in the area.



Overall Marketplace

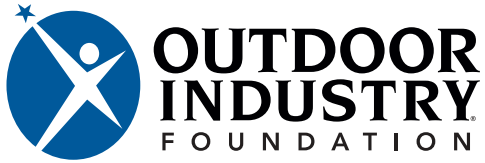


Demographically, participants in human powered outdoor activities span age groups, geographic regions, and gender lines.

- 43% of participants are between the ages 16-34 and 57% of the participants are 35 years or older.
- Gender is evenly split (52% male, 48% female).

Compared to the general population, participants in human powered outdoor activities skew younger, more upscale and have families. In addition, a higher share of outdoor participants live in the West compared to the General population.

- Average age of human powered outdoor activity participants is 38.8 years vs. the general population at 43 years.
- More human powered outdoor activity participants have children (47%) compared to the general population (43%).
- And human powered outdoor activity participants have a higher household income (\$57,800 vs. \$50,700 respectively).



Respondent Demographic Profile

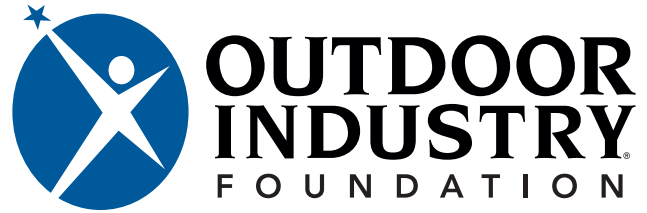
	Gen. Pop. (7682)	Participants (2054)
Age		
16-24	15%	24%
25-34	18%	19%
35-44	22%	19%
45+	44%	38%
Average age	43.0 years	38.8 years
Gender		
Male	49%	52%
Female	51%	48%
Race		
White	77%	76%
Some College or More	55%	63%
Employed	60%	64%
Married/Living with Partner	62%	55%
Average Number of Adults in Household	2.2	2.3
Have Children	43%	47%
Average Age of Children	9.9 years	10.2 years
Median Household Income	\$50,700	\$57,800



Respondent Demographic Profile

	Gen. Pop. (7682)	Participants (2054)
Census Regions		
East	23%	21%
South	31%	27%
Midwest	24%	26%
West	22%	26%
Type of Area Live		
Urban/City	26%	27%
Suburban	31%	33%
Small town	26%	25%
Rural	17%	15%





Attitudes



Overall, participants are involved in outdoor activities for more than just the functional benefits. They are in it for the emotional benefits.

- 88% of participants enjoy the feeling of accomplishment.
- 88% of participants feel the natural setting allows them to escape the pressures of everyday life.
- 79% of participants feel it keeps them feeling young.
- And 76% of participants feel it allows them to connect with themselves.

Because of the emotional benefits, participating in outdoor activities is a life- long experience that they want to share, especially with family.

- 67% of participants state they have been participating in outdoor activities for as long they can remember.
- 77% of participants know how to get started in any outdoor activity that interests them.
- 55% of participants would like their children to experience more outdoor recreational activities.
- And 79% of participants feel outdoor activities strengthen family relationships.

Many participants are proactive about their health and outdoor activities are part of their healthy lifestyle.

- 79% of participants state they are proactively take charge of their health.
- 63% of participants like activities that are physically challenging.
- 47% of participants push themselves to best their previous performance.
- And 50% of participants participate in outdoor activities as the main way they get their exercise.

Although outdoor activities are important to the participants, time is an issue for many, so they choose to participate only when the weather cooperates.

- 38% of participants state they have too many commitments in their lives to consider outdoor activities.
- 59% of participants participate only when the weather cooperates.
- 28% of participants would rather exercise indoors than outdoors.

Attitudes Summary

In general, there are few differences in attitudes driven by age. If a participant is involved in outdoor recreational activities they get the same emotional benefits regardless of age.

- 16-24 year olds are more likely to be involved in more physically challenging activities.
- While older participants are driven to participate in activities because of health reasons.

Attitudes - Attitudinal Factors

In order to get a sense of outdoor sport participants' attitudes toward outdoor activities, respondents were asked their level of agreement toward 28 statements.

Factor Analysis was conducted to classify individual statements into a smaller number of underlying dimensions.

Outdoor Connection

Inexperience

**Fairweather
Participators**

Less Active

Outdoor Extreme



Attitudes Toward Outdoor Activities Strongly Agree/Agree

	Participants				
	Total (2054) %	Age 16-24 (498) %	Age 25-34 (380) %	Age 35-44 (397) %	Age 45+ (779) %
Outdoor Connection					
I enjoy the feeling of accomplishment after participating in an outdoor activity	88	89	92	89	85
Getting into a natural setting allows me to escape the everyday pressures of life	88	83	87	89	91
I am doing my part to protect the environment	83	71	75	87	94
Participating in outdoor activities strengthens our family's relationship with one another	79	67	82	91	79
Participating in outdoor activities keeps me feeling young	79	73	79	77	83
I would know how to get started in a new outdoor activity that interests me	78	77	73	76	78
Participating in outdoor activities allows me to connect with myself	76	73	77	74	79
Even though there are many things I would like to own, I prefer spending money on the <u>experiences</u> that will enrich my life	73	71	72	74	76
I try to spend as much time outdoors as possible	63	58	57	64	67
Participating in outdoor activities is the main way I get my exercise	50	52	43	53	50
I consider myself a very social person	67	67	63	65	70
I would like my children to experience more outdoor recreational activities, such as hiking, camping, fishing or canoeing	55	26	51	68	66

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Attitudes Toward Outdoor Activities Strongly Agree/Agree

Participants

	Total (2054) %	Age 16-24 (498) %	Age 25-34 (380) %	Age 35-44 (397) %	Age 45+ (779) %
Less Active					
I proactively take charge of my own health (negative)	79	75	67	76	89
I was more active in the past than I am now	70	58	73	69	77
I have too many other commitments in my life right now to consider outdoor activities	38	43	42	39	33
My weight sometimes prevents me from participating in various activities	28	19	33	25	34
I think watching TV or videos together is a great way to build family relationships	45	55	49	47	36
Inexperience					
I've been participating in some sort of outdoor activity for as long as I can remember(negative)	67	65	57	65	74
I never really had a mentor in my life who taught me about the outdoors	50	47	52	48	54
I am not very experienced in outdoor activities	37	36	45	35	36
My idea of "roughing it" is spending the night in a cheap hotel	21	15	20	19	26
Outdoor Extreme					
I like activities that are physically challenging	63	76	65	64	53
I push myself to best my previous physical performance	47	67	40	43	39
I engage in outdoor activities that are considered "extreme"	15	35	13	9	7

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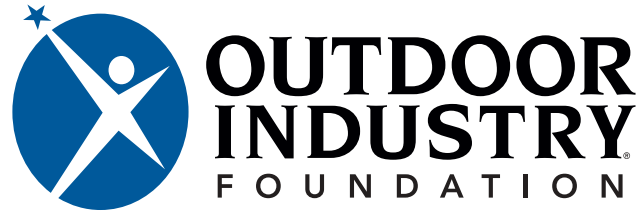
Attitudes Toward Outdoor Activities

Strongly Agree/Agree

Participants

	Total (2054) %	Age 16-24 (498) %	Age 25-34 (380) %	Age 35-44 (397) %	Age 45+ (779) %
Fairweather Participators					
I only participate in outdoor activities when the weather cooperates	59	51	70	54	61
I would much rather exercise indoors than outdoors	28	28	36	21	27
I think most outdoor sports are too extreme	14	10	14	13	17
I hate to travel	8	6	9	7	10





Past 2 Year Participation



Past 2 Year Participation Summary

Outdoor recreational activities in general are popular among the U.S. population and human powered outdoor activities is a driving force behind that popularity.

- 91% of the U.S. population has participated in at least one outdoor activity including swimming, gardening, golf, boating, etc.
- 57% of the U.S. population has participated in at least one human powered outdoor activity, with an average participation frequency of 54 times in the past 2 years.

The most popular human powered outdoor activities revolve around activities that are affordable and easily accessible – bicycling, hiking and camping.

- 30% of the population currently bicycle mainly on paved roads for an average of 52.3 times in the past 2 years.
- 27% of the population currently hike an average of 21.5 times in the past 2 years.
- And 25% of the population currently camp an average of 5.8 times in the past 2 years.
- These outdoor sport activities are also the most favored activities among participants.

Past 2 Year Participation Summary

Not surprisingly, as people age, participation overall, and in the more physical human powered outdoor activities, declines.

- 67% of 16-24 year olds participate in outdoor activities compared to only 47% of 45+ year olds.
- Activities such as bicycling, hiking, camping, paddle sports, trail running and climbing have lower participation levels among the 45+ age group.
 - This is true for most of the human powered outdoor sports except bird watching, fly fishing, cross country/Nordic skiing and snowshoeing.
- In addition, younger participants of human powered outdoor activities are more likely to be more frequent participators in the sports they are participating in. (16-24 year olds have participated in an outdoor activity an average of 64 times in the past 2 years vs. 55 times for 45+ year olds).

Participation Summary

	Gen. Pop.	Participants
	(7682)	(2054)
Participate in any outdoor activity	91%	100%
Average # of outdoor activities	4.3	6.1
Participate in human powered outdoor activities	57%	100%
Participate in 1 activity	22%	41%
Participate in 2 activities	13%	21%
Participate in 3+ activities	22%	38%
Average # of human powered activities	1.3	2.6
Plan to participate in additional outdoor activities	45%	77%
Currently <u>do not</u> participate in human powered outdoor activities	43%	-
Used to participate	33%	-
Plan to participate	24%	-

Past 2 Year Participation

	General Population					Participants
	Total (7682)	Age 16-24 (1182)	Age 25-34 (1384)	Age 35-44 (1743)	Age 45+ (3359)	(2054)
	%	%	%	%	%	%
Participate in any activity	91	91	91	93	89	100
Participate in any human-powered activity	57	67	65	62	47	100
Bicycling (net)	30	41	35	31	24	53
Bicycling - paved road	28	39	31	29	23	50
Bicycling - off road	10	17	12	10	7	15
Hiking/Backpacking (net)	28	35	33	32	22	49
Hiking	27	32	31	31	22	47
Backpacking	8	13	10	9	4	13
Camping in a tent	25	32	33	31	16	43
Paddle Sports (net)	15	25	16	14	12	29
Canoeing	10	15	10	9	7	17
Rafting	6	11	7	6	4	11
Kayaking	5	9	4	5	4	9
Downhill skiing/Snowboarding (net)	7	16	10	7	4	13
Downhill skiing (with lift access)	6	10	7	6	4	10
Snowboarding (with lift access)	3	9	5	1	-	4
Trail running	6	17	6	5	2	12
Climbing	5	16	5	4	2	9
Bird watching	5	2	4	5	6	7
Fly-fishing	4	3	3	5	5	7

Past 2 Year Participation (continued)

	General Population					Participants
	Total (7682) %	Age 16-24 (1182) %	Age 25-34 (1384) %	Age 35-44 (1743) %	Age 45+ (3359) %	(2054) %
Cross-country/Nordic skiing/ Telemark (net)	2	4	3	2	2	5
Cross-country/Nordic skiing	2	3	2	2	2	5
Telemark skiing	-	1	-	1	-	1
Snowshoeing	2	2	2	2	2	3
Other Recreational Activities						
Swimming	47	68	52	52	35	61
Walking vigorously for exercise	43	38	41	44	45	49
Gardening	43	20	34	46	53	45
Jogging/Working out	38	63	47	37	25	47
Conventional fishing	24	18	23	29	24	30
Boating	21	25	20	21	19	29
Golf	16	18	17	17	14	21
Off road recreation	9	14	14	11	5	13
Hunting	9	7	9	11	8	11
Water skiing	4	9	6	3	2	9
Snowmobiling	3	5	5	4	2	5
Surfing/Wind surfing	2	5	2	2	1	3
Adventure racing	1	3	3	1	-	1
Other outdoor activity	19	24	21	20	15	23
I do not participate in recreational activities	9	9	9	7	11	-



Number of Outdoor Activities Participate In

Participants					
	Total (2054) %	Age 16-24 (498) %	Age 25-34 (380) %	Age 35-44 (397) %	Age 45+ (779) %
One	37	23	38	38	47
Two	21	22	20	19	22
Three	13	13	11	20	12
Four	9	13	13	8	5
Five	8	7	9	8	7
Six or more	12	22	9	8	7
Average # of human powered outdoor activities participate in	2.6	3.4	2.5	2.6	2.2





Number of Times Participate in Outdoor Activities in Past 2 Years*

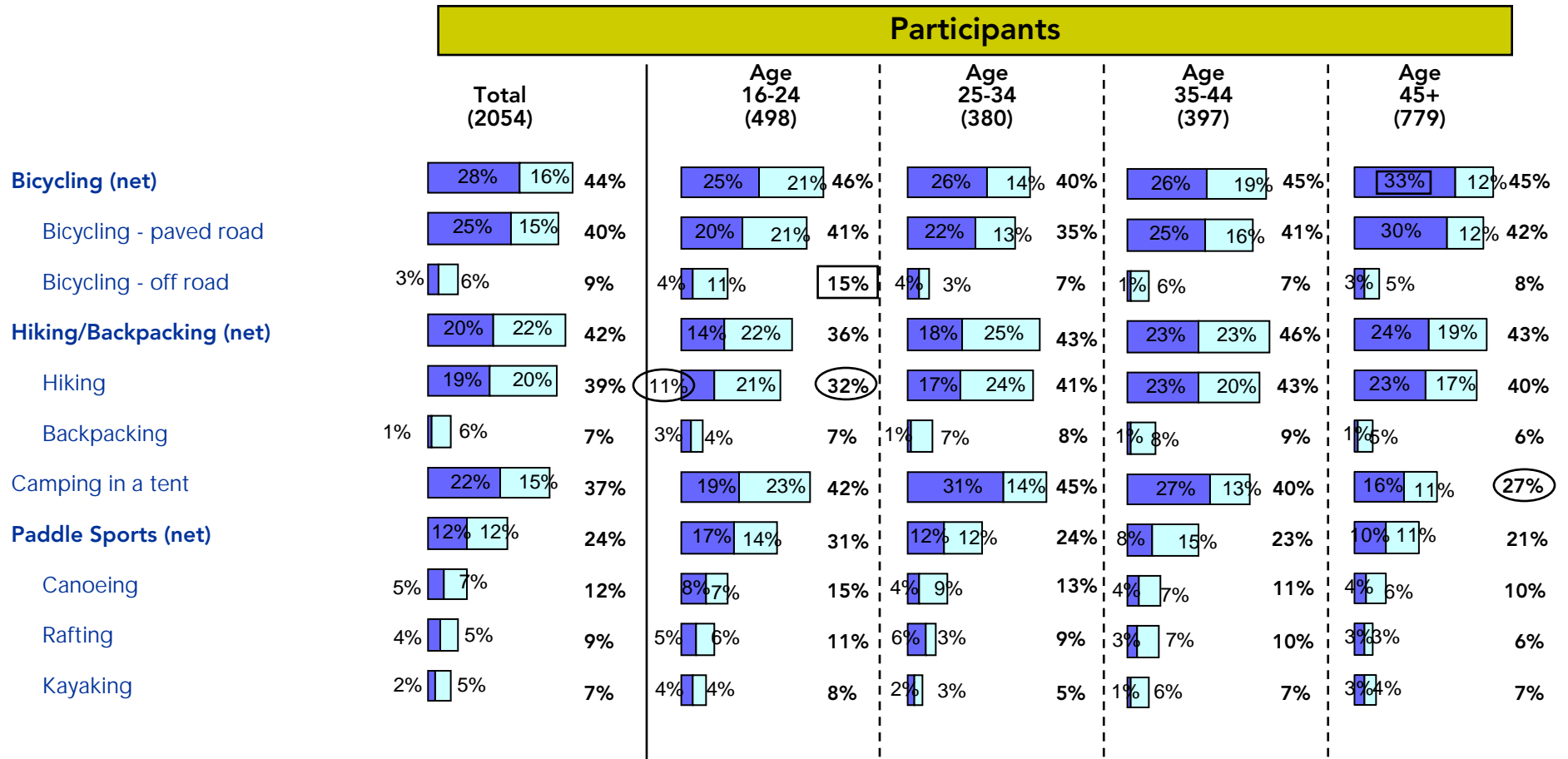
	Participants				
	Total	Age 16-24	Age 25-34	Age 35-44	Age 45+
Overall	54.4	64.4	40.2	53.6	55.4
Bicycling (net)	52.3	51.8	43.8	47.6	59.9
Bicycling - paved road	46.2	44.9	33.2	44.0	54.6
Bicycling - off road	29.0	21.5	44.1	24.9	34.2
Hiking/Backpacking (net)	22.6	20.0	18.1	22.6	26.8
Hiking	21.5	19.0	17.4	20.4	26.1
Backpacking	7.2	6.4	5.9	8.6	7.2
Camping in a tent	5.8	5.3	5.6	4.8	7.3
Paddle Sports (net)	5.6	4.8	5.2	5.5	6.8
Canoeing	4.7	3.3	3.9	4.3	7.2
Rafting	2.7	3.0	1.9	2.8	2.8
Kayaking	5.5	4.4	8.6	4.1	6.1
Downhill skiing/Snowboarding (net)	10.7	11.1	13.1	8.0	10.3
Downhill skiing (with lift access)	9.6	9.5	10.9	7.5	10.1
Snowboarding (with lift access)	9.2	8.7	**	**	**
Trail running	63.3	47.0	32.5	103.4	89.7
Climbing	7.6	8.3	4.5	5.4	**
Bird watching	19.6	**	**	23.7	20.4
Fly-fishing	9.0	--	--	12.0	8.5
Cross-country/Nordic skiing/Telemark (net)	9.1	6.5	**	**	12.6
Cross-country/Nordic skiing	8.5	6.2	**	**	11.1
Telemark skiing	**	**	**	**	**
Snowshoeing	6.7	**	**	**	8.3

*Mean

**Not shown due to small base size

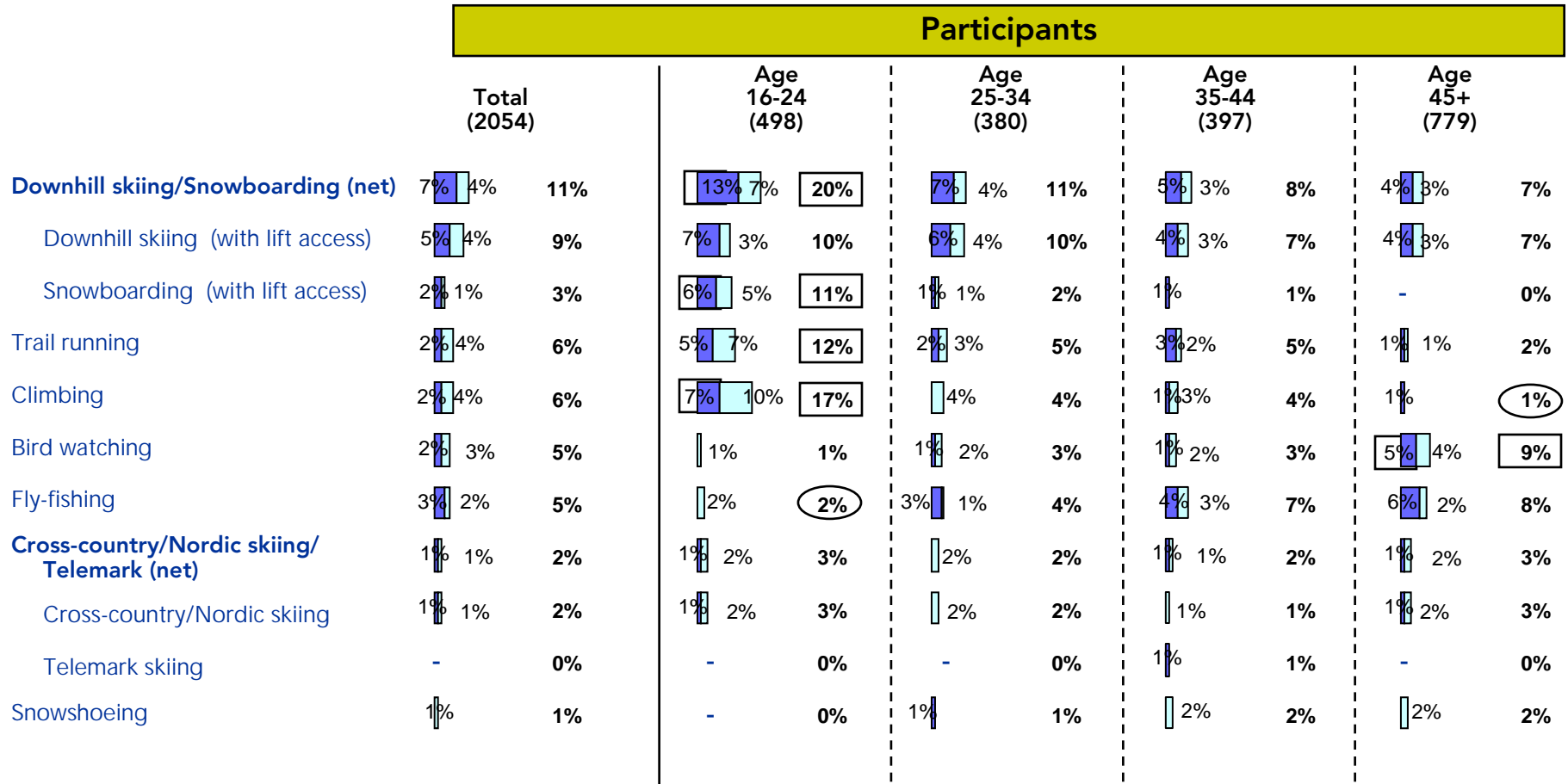




Favorite Activities Among Participants



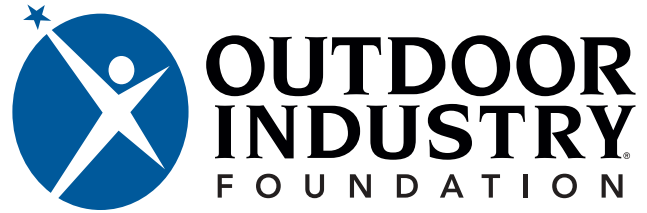
■ Top favorite activity
■ 2nd & 3rd favorite activity

Favorite Activities Among Participants



 Top favorite activity
 2nd & 3rd favorite activity





Retail



Participation in outdoor activities is not inexpensive, especially for equipment.

- Participants spend an average of \$787 -- \$301 on apparel and \$487 on equipment.
- 16-24 year olds spend the least amount at \$540.

The most frequented type of store for purchasing both apparel and equipment is discount stores, followed by sporting goods stores.

- 57% of participants have purchased apparel, and 60% have purchased equipment, at discount stores.
- 49% of participants have purchased apparel, and 40% have purchased equipment, at sporting goods stores.
- Nearly one-third of participants have purchased apparel and equipment from outdoor specialty stores.

The top reasons to purchase at a particular outlet revolve around price, convenience and quality.

- Has reasonable/fair prices is most frequently mentioned (69%).
- Convenient location is mentioned by 52% of participants.
- Quality of the merchandise is mentioned by 49% of participants.

The least important reasons revolve around rewards programs, activity information and knowledgeable sales people.

Outdoor specialty stores and outdoor chain stores are perceived similarly, although outdoor chain stores excel on key items.

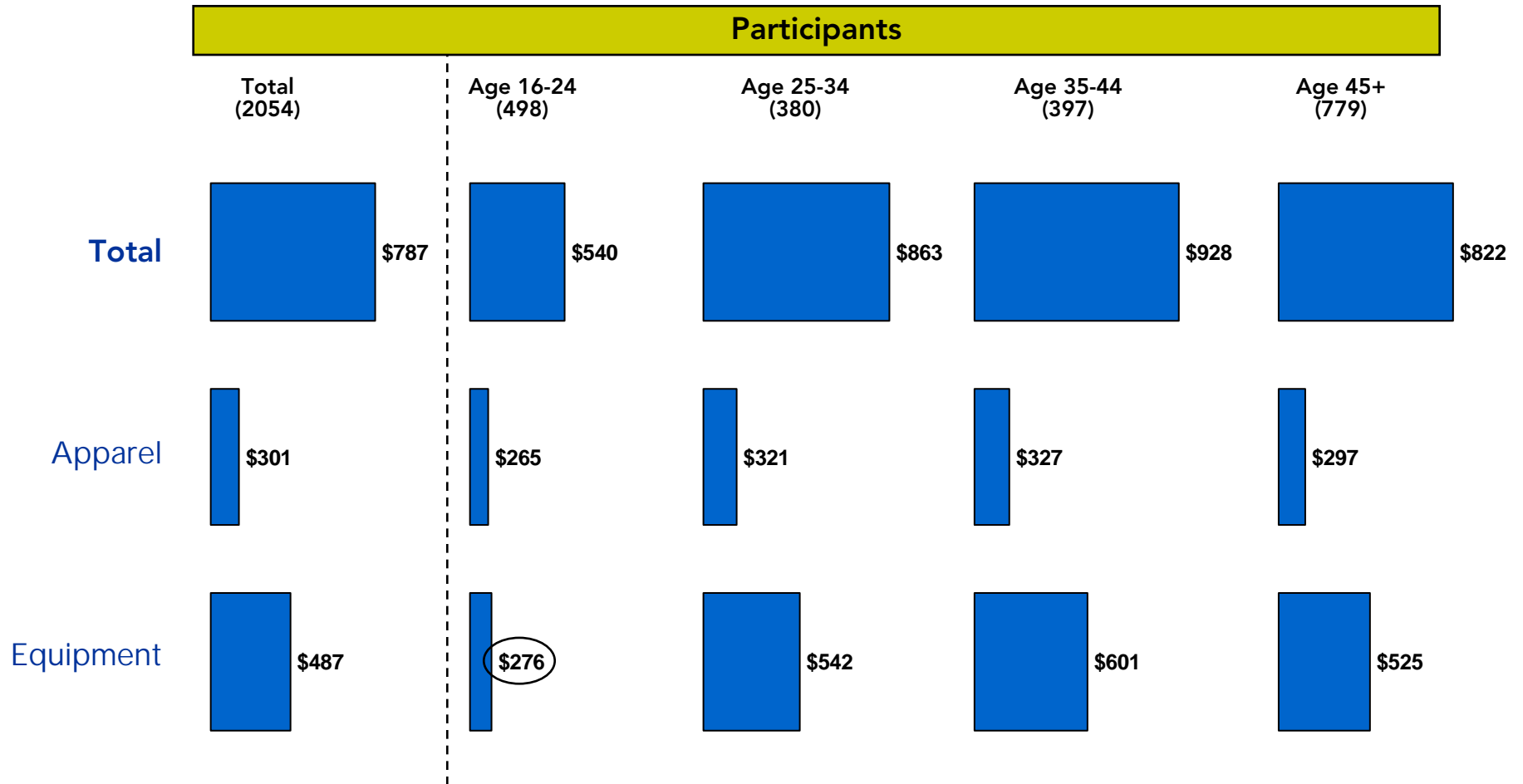
- Outdoor chain stores excel on many important reasons to purchase, especially:
 - Has gear/equipment want/need
 - Good quality merchandise/reliable dependable products
 - Has clothing want/need
 - Good selection/variety
 - Knowledgeable/experienced sales people
- Outdoor specialty stores also excel on knowledgeable/experienced sales people and has unique items/specialty products.

Discount stores excel at two of the most important reasons to shop at a store – fair prices and convenient location.

Although discount stores are frequented, participants in outdoor activities spend more money at specialty stores.

- Participants spend an average of \$1,485 at specialty stores compared to only \$848 at discount stores.
- Participants have also spent a considerable amount online, \$1,656.

Retail - Amount Spent*



*Past 2 years





Retail

Type of Store Where Participants Shop

	Participants	
	Apparel/Footwear (1778)	Equipment (1444)
	%	%
Discount stores (net)	57	60
Discount stores – such as Wal-Mart, Target, Kmart or Kohl's	56	59
Discount store websites	3	3
Discount store catalogs	3	2
Sporting good stores (net)	49	40
Sporting good stores – such as Dick's, Sports Authority or Sport Chalet	44	37
Sporting goods store websites	7	4
Sporting goods store catalogs	6	3
Outdoor specialty stores (net)	29	29
Outdoor specialty stores – exclusively sell outdoor merchandise	24	24
Outdoor specialty store websites	8	8
Outdoor specialty store catalogs	6	5
Outdoor chains stores (net)	28	23
Outdoor chain stores – such as REI, L.L. Bean, Cabelas	25	20
Outdoor chain store websites	7	5
Outdoor chain store catalogs	5	4
Department stores (net)	22	8
Department stores – such as Macy's or Nordstrom	19	6
Department store websites	3	1
Department store catalogs	3	1
Websites (net)	19	14
Factory outlet stores	1	-
Online/eBay	1	7
Other	5	1
Not sure	3	4





Retail - Type of Store Where Participants Shop Most Often

	Participants	
	Apparel/Footwear (1778)	Equipment (1444)
	%	%
Discount stores (net)	35	42
Discount stores – such as Wal-Mart, Target, Kmart or Kohl's	34	41
Discount store catalogs	1	1
Discount store websites	-	-
Sporting good stores (net)	25	20
Sporting good stores – such as Dick's, Sports Authority or Sport Chalet	23	19
Sporting goods store websites	1	-
Sporting goods store catalogs	1	1
Outdoor specialty stores (net)	12	15
Outdoor specialty stores – exclusively sell outdoor merchandise	9	12
Outdoor specialty store websites	2	2
Outdoor specialty store catalogs	1	1
Outdoor chains stores (net)	12	12
Outdoor chain stores – such as REI, L.L. Bean, Cabelas	9	10
Outdoor chain store websites	2	1
Outdoor chain store catalogs	1	1
Department stores (net)	9	2
Department stores – such as Macy's or Nordstrom	7	2
Department store catalogs	1	-
Department store websites	1	-
Websites (net)	6	5
Factory outlet stores	1	-
Online/eBay	-	-
Other	3	4
Not sure	3	4





Retail

Most Important Reasons for Purchases

	Participants		
	Overall (1801) %	Apparel (1699) %	Equipment (1372) %
Has reasonable/fair prices	69	59	56
Has the gear and equipment I want/need	53	40	48
Convenient location	52	41	41
Has good quality merchandise/reliable, dependable products	49	41	36
Has the clothing I want/need	47	39	21
Has a good selection/variety of products	44	38	36
Has the brands I want	42	31	28
Has good sales/frequent sales	39	32	25
One stop shopping	37	34	36
Has the sizes I want	32	31	18
Has good return policy	30	24	24
Has good guarantee/stand behind products	26	20	19
Has unique items/specialty products	24	16	19
Knowledgeable/Experienced salespeople	22	16	19
Salespeople are willing to help/Has available salespeople	20	15	16
Fun store/fun place to shop	19	14	15
Salespeople are friendly and approachable	17	13	13
Has the technical, advanced level products I want/need	15	10	13
Has additional information about the activity(ies) I am interested in	12	8	11
Has a rewards program for purchases made	7	4	6
Other	2	2	2





Retail - Most Important Reasons for Purchasing Apparel

Participants

	Outdoor Specialty Stores (226) %	Outdoor Chain Stores (270) %	Sporting Goods Stores (440) %	Department Stores (132) %	Discount Stores (580) %	Web (99) %
Has the gear and equipment I want/need	56	68	47	19	27	52
Has good quality merchandise/reliable, dependable products	54	71	41	42	27	56
Has reasonable/fair prices	56	51	43	44	78	66
Has unique items/specialty products	45	32	19	5	2	39
Has the clothing I want/need	43	56	44	35	31	52
Has a good selection/variety of products	42	56	44	28	27	45
Knowledgeable/Experienced salespeople	34	35	17	16	2	14
Has the brands I want	34	33	38	38	21	36
Has the sizes I want	29	29	27	34	29	42
Has the technical, advanced level products I want/need	23	26	12	3	1	9
Salespeople are willing to help/Has available salespeople	23	28	12	15	11	3
Has good guarantee/stand behind products	22	48	15	18	13	27
Convenient location	23	23	36	44	59	19
One stop shopping	21	39	29	20	44	34
Has good return policy	19	35	15	21	31	42
Has additional information about the activity(ies) I am interested in	17	20	12	1	1	12
Salespeople are friendly and approachable	17	18	12	11	11	3
Has good sales/frequent sales	15	21	26	38	42	36
Fun store/fun place to shop	11	19	13	13	14	7
Has a rewards program for purchases made	2	13	6	3	2	10
Other	5	2	1	2	2	4



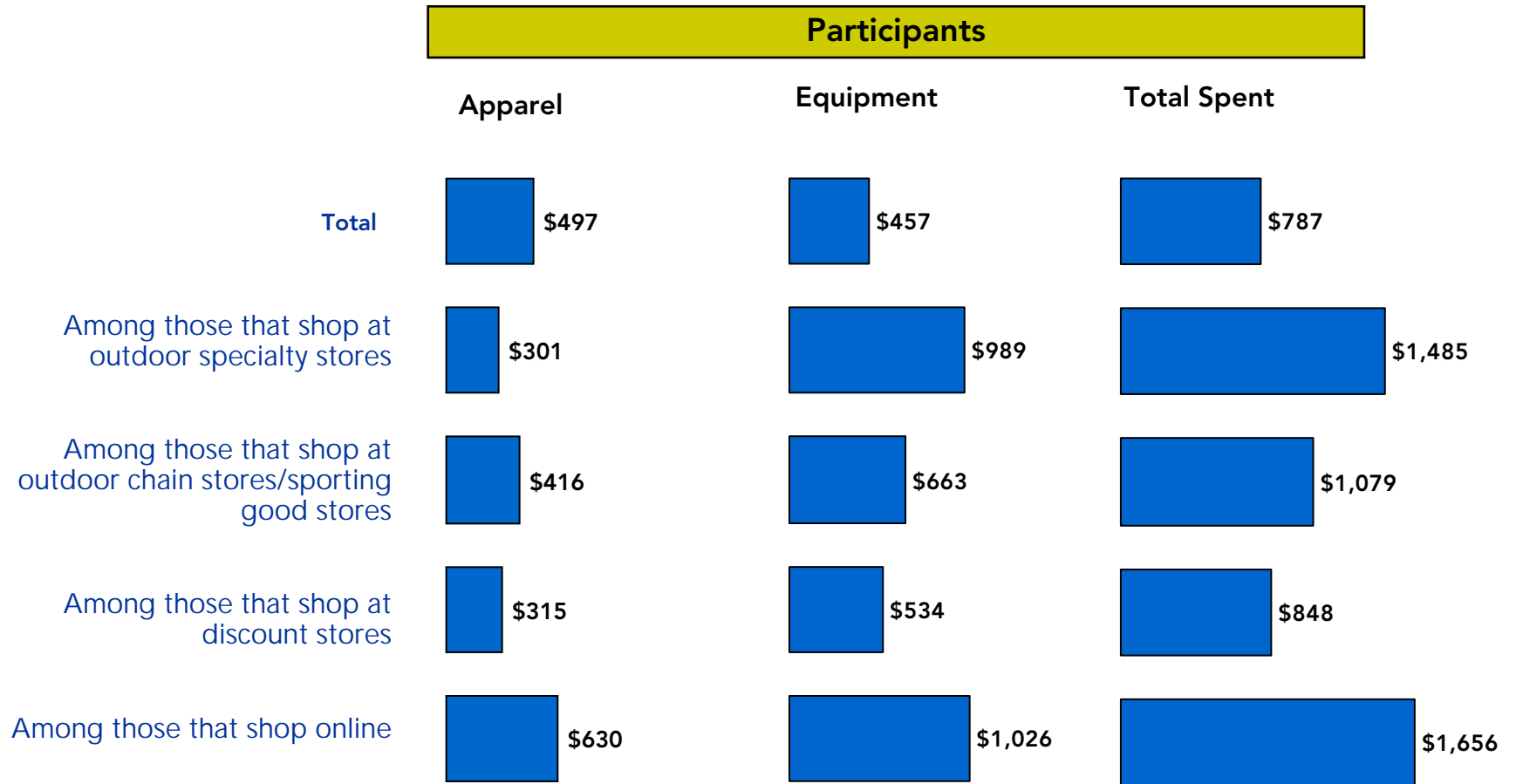
Retail - Most Important Reasons for Purchasing Equipment

Participants

	Outdoor Specialty Stores (253) %	Outdoor Chain Stores (213) %	Sporting Goods Stores (290) %	Discount Stores (535) %	Web (86) %
Has the gear and equipment I want/need	63	63	49	39	56
Has good quality merchandise/reliable, dependable products	48	68	36	24	41
Has a good selection/variety of products	42	53	46	26	41
Has unique items/specialty products	41	38	17	5	44
Knowledgeable/Experienced salespeople	40	34	30	3	4
Has the technical, advanced level products I want/need	36	30	9	2	23
Has the brands I want	35	35	33	21	37
Has reasonable/fair prices	33	41	42	74	55
One stop shopping	28	33	23	49	40
Convenient location	26	17	40	55	17
Has good guarantee/stand behind products	23	47	17	12	34
Salespeople are willing to help/Has available salespeople	23	26	20	9	4
Has additional information about the activity(ies) I am interested in	20	22	17	2	8
Salespeople are friendly and approachable	20	22	14	8	3
Has the clothing I want/need	19	34	26	16	30
Has good sales/frequent sales	18	22	19	32	24
Fun store/fun place to shop	18	20	14	14	11
Has good return policy	16	35	11	32	23
Has the sizes I want	15	22	20	17	28
Has a rewards program for purchases made	5	18	6	2	13
Other	3	1	1	1	3

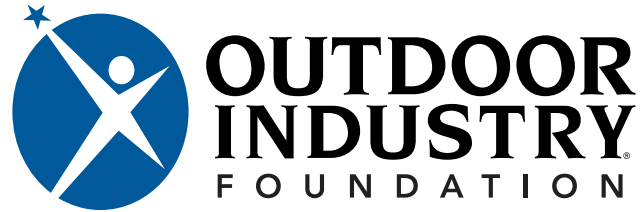
*Department Stores not shown due to small base size.

Retail - Amount Spent*



*Past 2 years





Barriers to Participation in Outdoor Activities



As age increases, the likelihood of lapsing increases.

- 33% of the U.S. population no longer participate in the outdoor activity they participated in when they were 5-18 years old, but they may be involved in others.
- 22% of 16-24 year olds have lapsed while 40% of those 45+ have lapsed.

Reasons for lapsing vary by age.

- Time commitments related to school, children, and household maintenance are the major reasons non-participants under age 44 have lapsed from their outdoor activities.
- The 45+ age group are more likely to cite physical health reasons, injury and “just don’t enjoy the activity any more”.

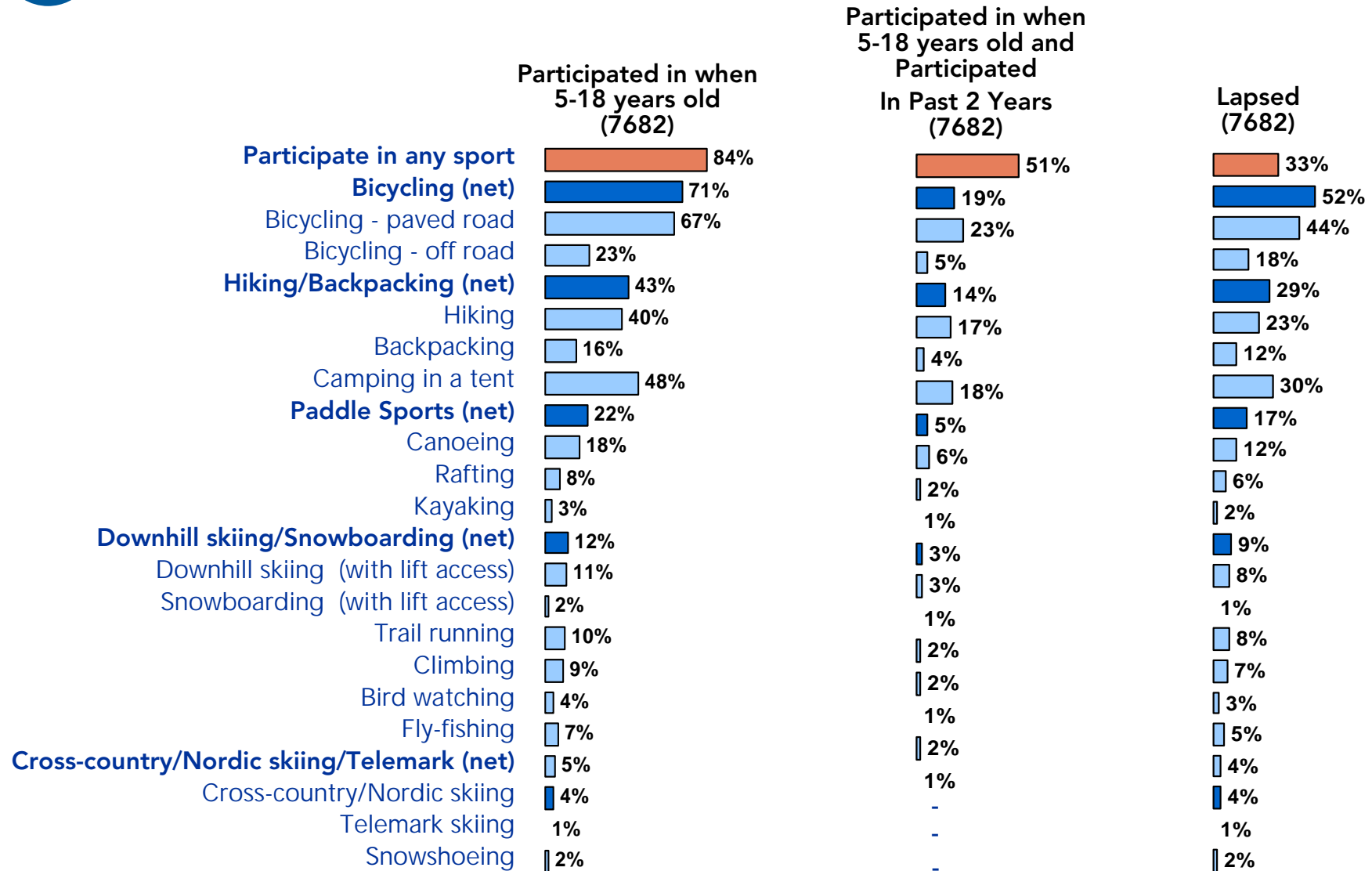
Barriers to Participation - Summary

In addition, participants feel time and money are the main barriers to participation.

- 60% of participants feel they don't have enough time to participate in outdoor activities.
- 39% of participants feel that costs associated with outdoor activities are a barrier to participation.
- Additionally, even though most agree they would know how to get started in an outdoor activity of interest to them, 30% feel getting started is a barrier to participation.

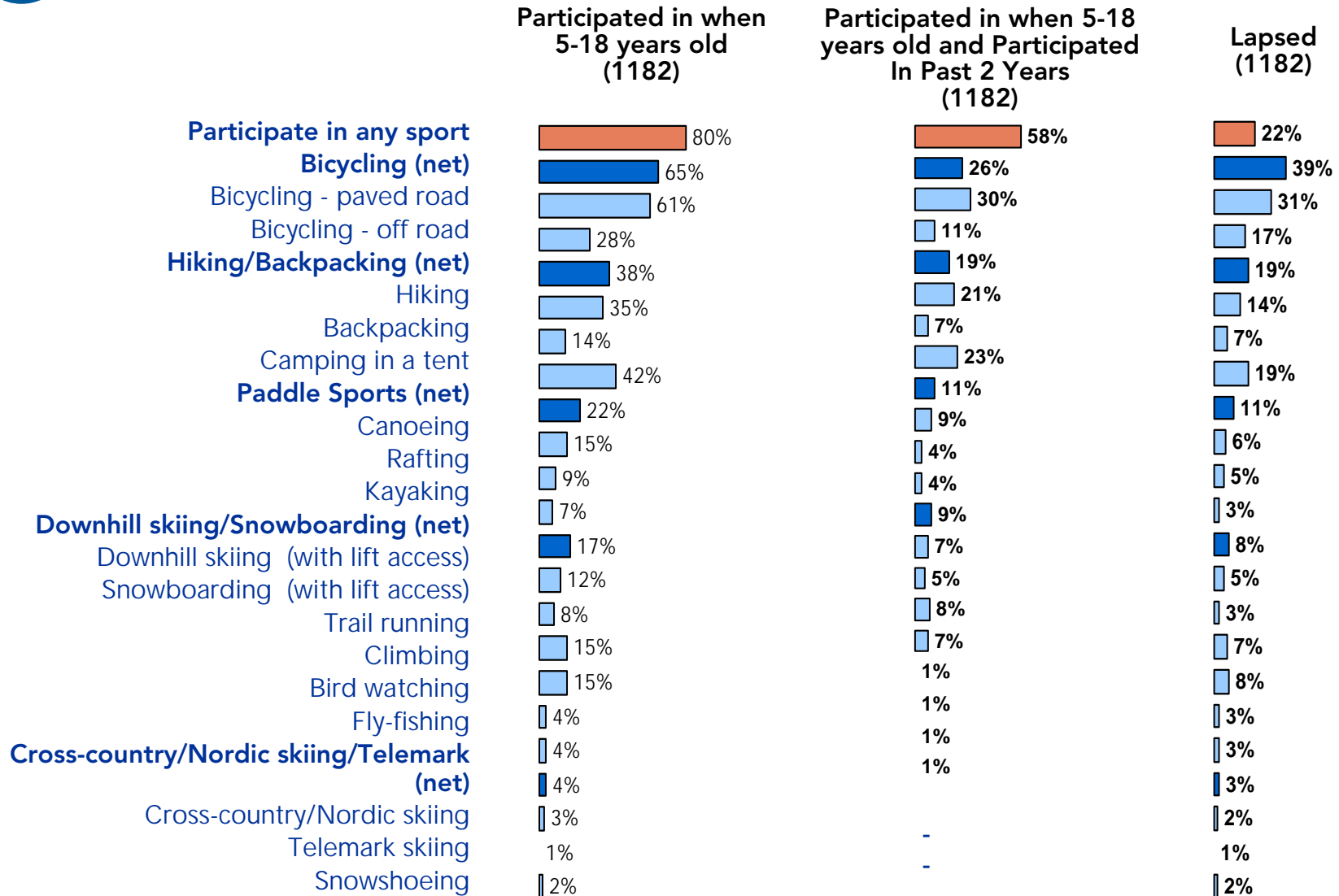


Lapsed Activities Among General Population



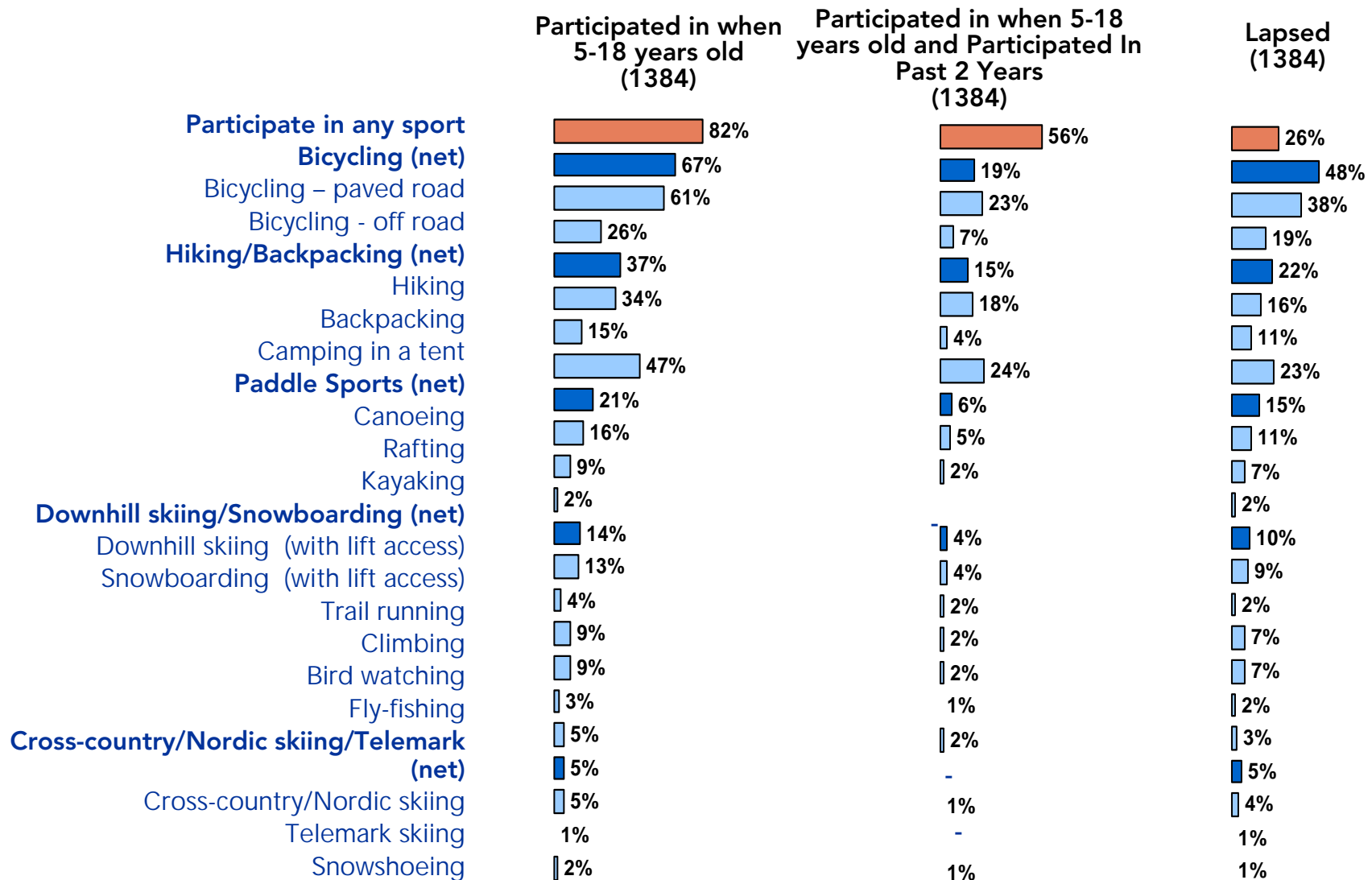


Lapsed Activities - Among General Population, Age 16-24 Years Old



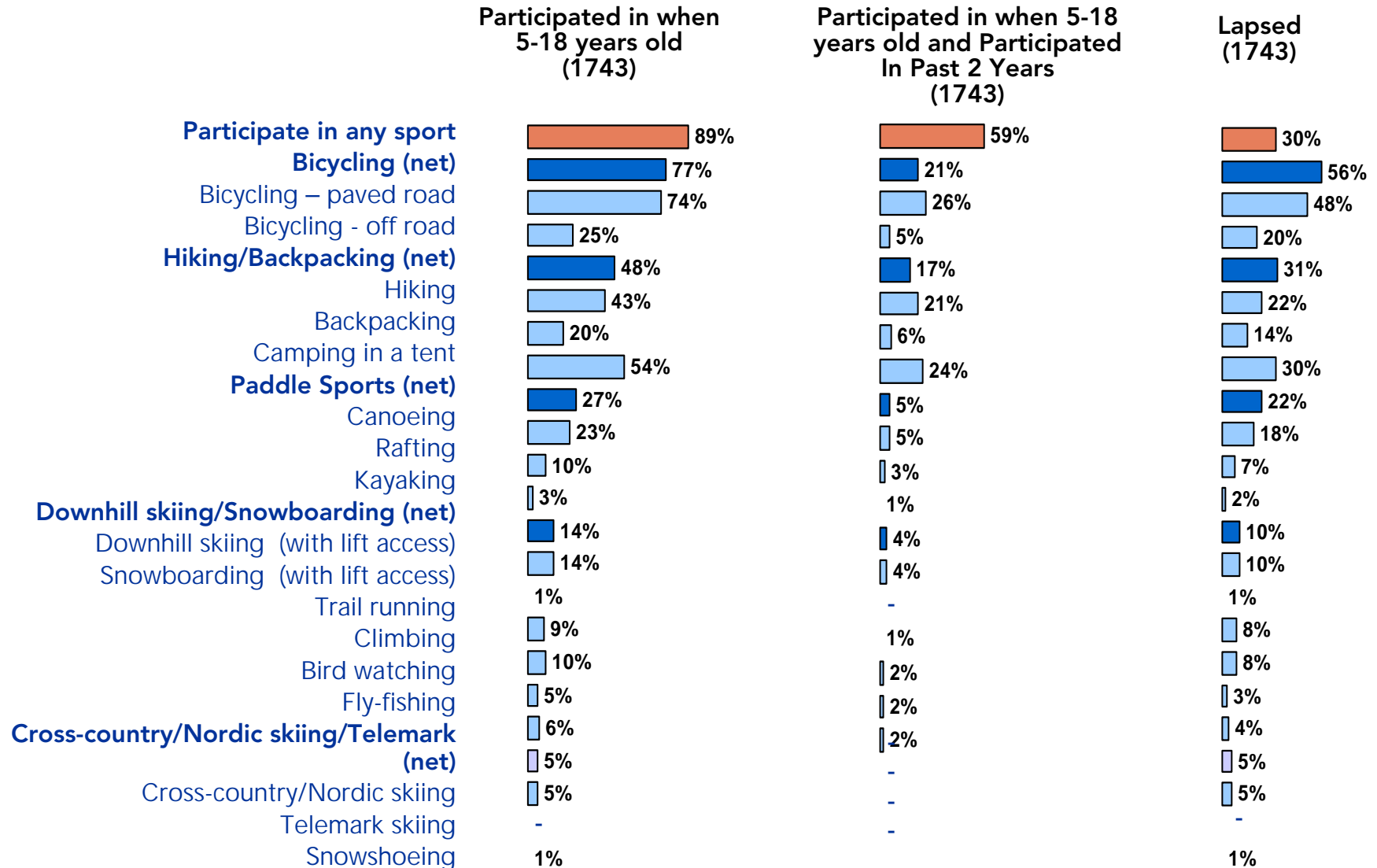


Lapsed Activities - Among General Population, Age 25-34 Years Old



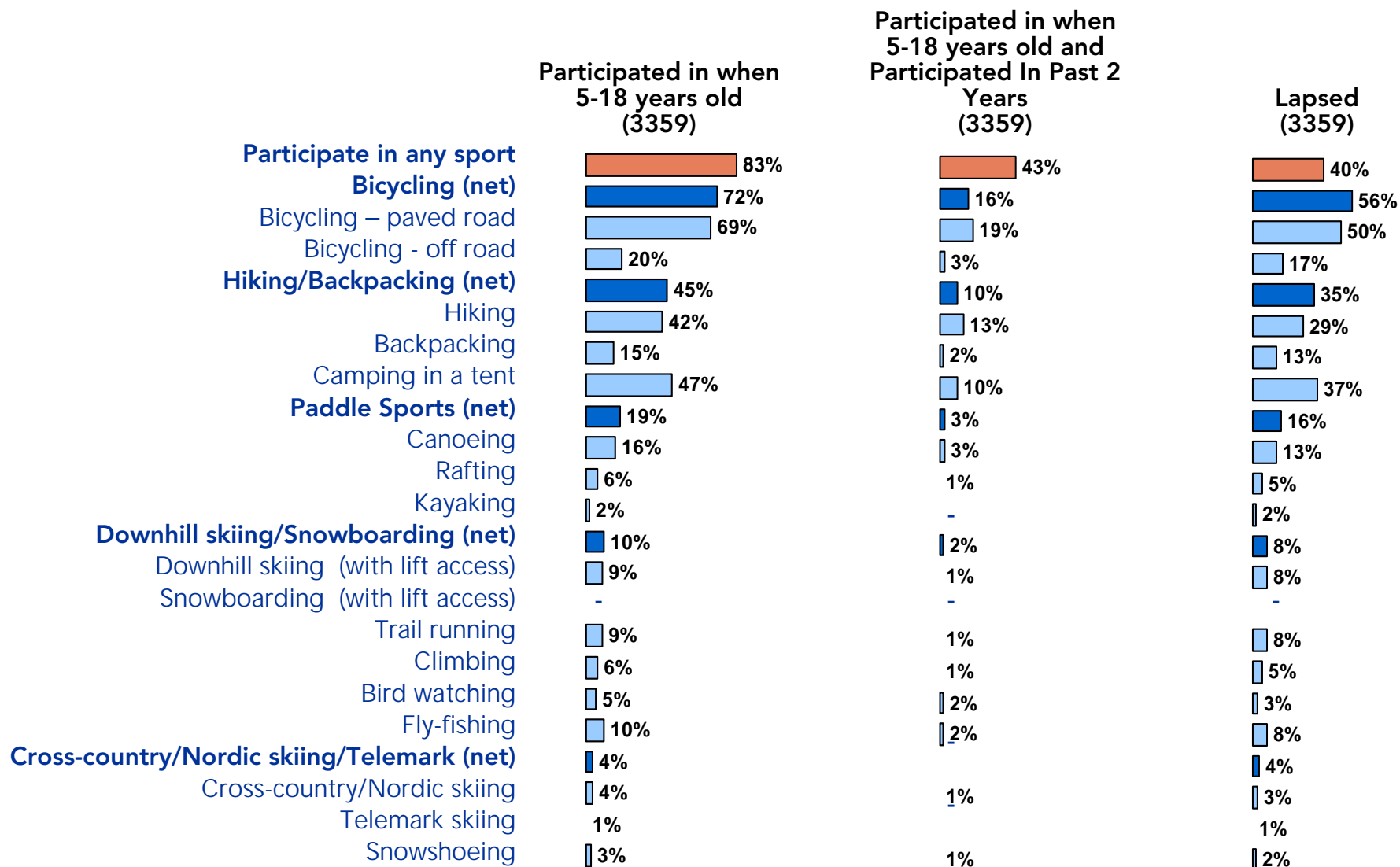


Lapsed Activities - Among General Population, Age 35-44 Years Old





Lapsed Activities - Among General Population, Age 45+ Years Old





Reasons For Stopping Activity*

General Population					
	Total (5660) %	Age 16-24 (708) %	Age 25-34 (977) %	Age 35-44 (1339) %	Age 45+ (2628) %
Time Commitments (net)	43	53	57	55	30
Job	22	26	30	28	16
Time commitments with children	18	4	35	33	10
Time commitments for home improvement/ repair/maintenance	14	6	13	19	14
Time commitments for school	8	38	9	4	1
Time commitments for elder care	3	-	2	3	4
Lack of necessary gear/equipment	22	24	31	23	18
Poor physical shape or health	20	6	13	15	28
Don't enjoy the activity anymore	19	18	14	15	24
I now participate in other sports/activities	19	21	15	19	20
Don't know anyone to do it with	16	21	19	14	15
Gained weight	15	6	15	16	16
Injury	11	6	7	10	13
Moved/no longer have access to activity	11	14	13	11	8
Gear/apparel for activity is too expensive	8	12	14	9	5
Volunteer organizations	3	4	2	2	4
It seems too dangerous or extreme	5	2	3	3	7
Access/entrance fees are too expensive	4	4	5	5	3
Still participate when I can (volunteered)	1	1	-	-	1
Other time commitments (volunteered)	1	1	1	1	1
Other	7	4	8	7	7

*Among those who lapsed for any activity

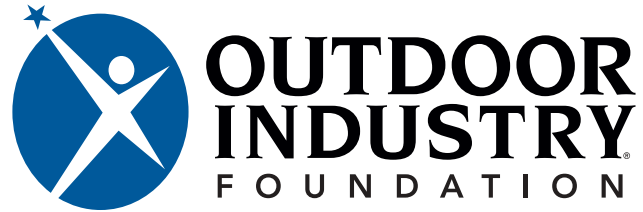




Top Challenges Getting People To Participate in Outdoor Activities

	Participants				
	Total (2054) %	Age 16-24 (498) %	Age 25-34 (380) %	Age 35-44 (397) %	Age 45+ (779) %
Adults don't have enough time or are too busy	60	50	64	64	61
Costs associated with gear and equipment	39	42	48	37	34
Disinterest among adults/parents	33	24	27	34	40
Lack of knowledge about how to get started/ what to do/where to go	30	34	28	29	29
Lack of nearby parks or areas to recreate	24	30	27	22	20
Concerns about safety while participating in the activity	18	15	15	19	20
Costs associated with access/entry/club fees	16	21	18	16	12
Disinterest among children	15	18	8	13	17
Involvement in team sports/other activities (soccer, basketball, dance, etc.)	14	13	9	18	15
Children don't have enough time	8	8	6	11	6
Traffic/parking concerns	5	4	4	6	6
Other	3	3	4	3	2
Not enough time	1	-	-	1	1
None	6	6	6	5	7





Opportunities Moving Forward

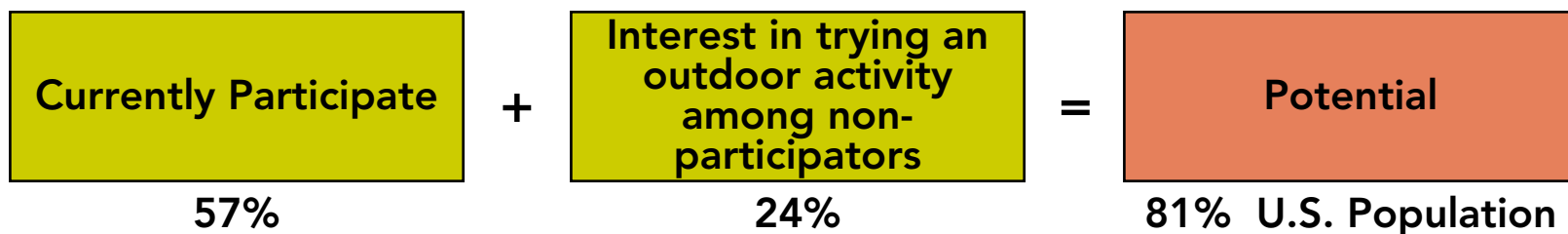


Participation Interest Summary

There are basically two ways to maintain or increase participation in human powered outdoor activities:

1. Sustain or increase frequency of participation among current participants.
2. Attract new/regain lapsed participants.

There is an opportunity to take advantage of interest in trying a human powered outdoor activity:

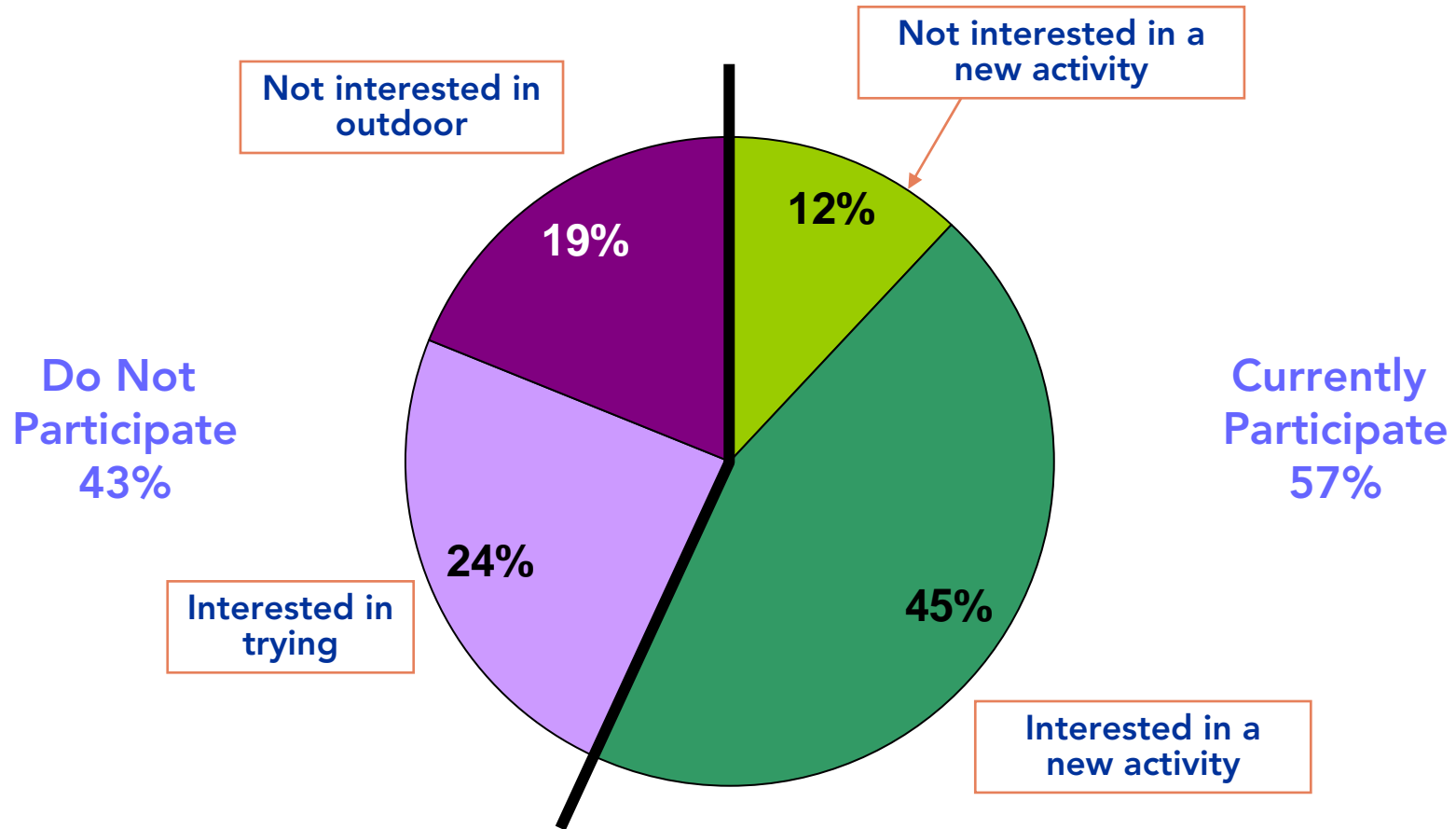


- The activities that stand to gain the most in participation are the same activities that are most popular – biking, hiking, and camping.

In addition, even among current participants, most are interested in new activities.

- 45% of U.S. population is interested in trying new activities in addition to their current activities.

Participation*



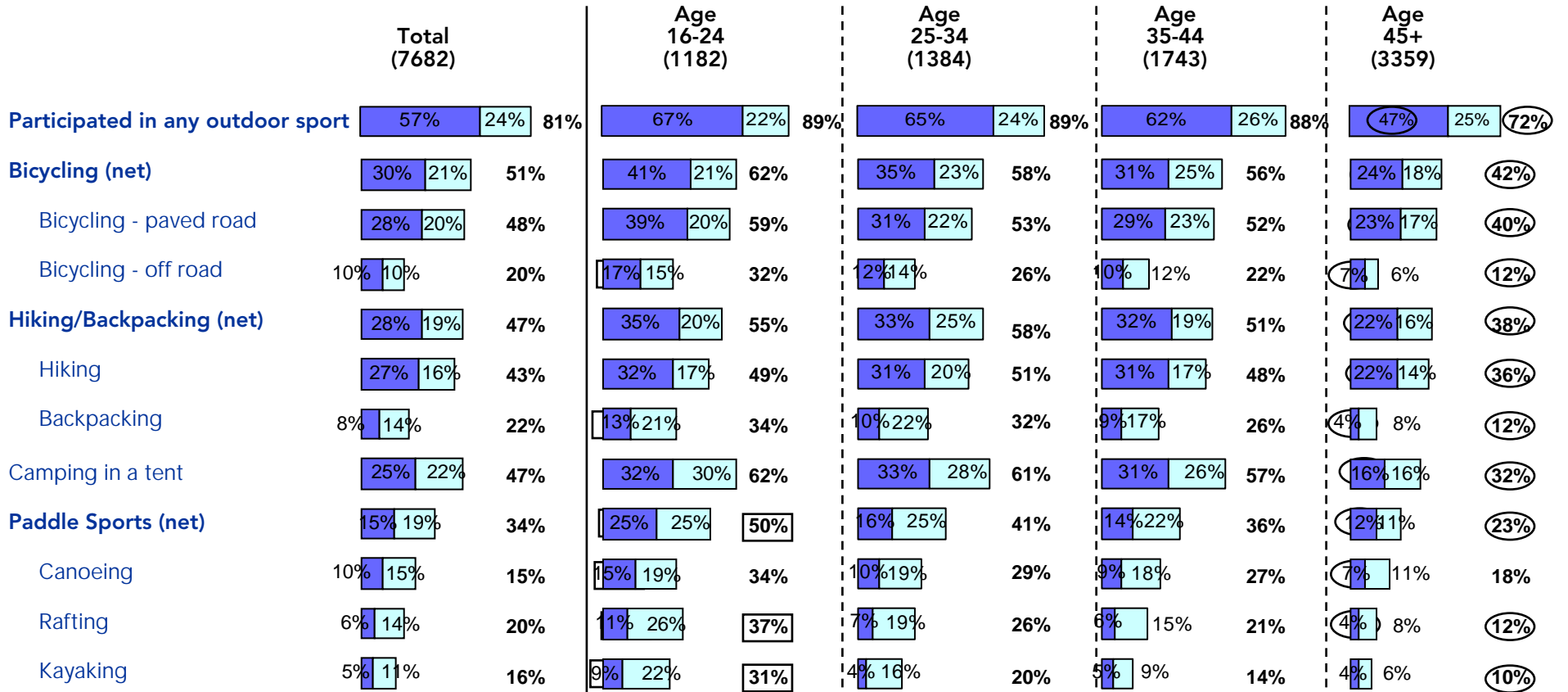
Human Powered Outdoor Activities Potential: 81%

*Base: General Population



Total Participation

General Population

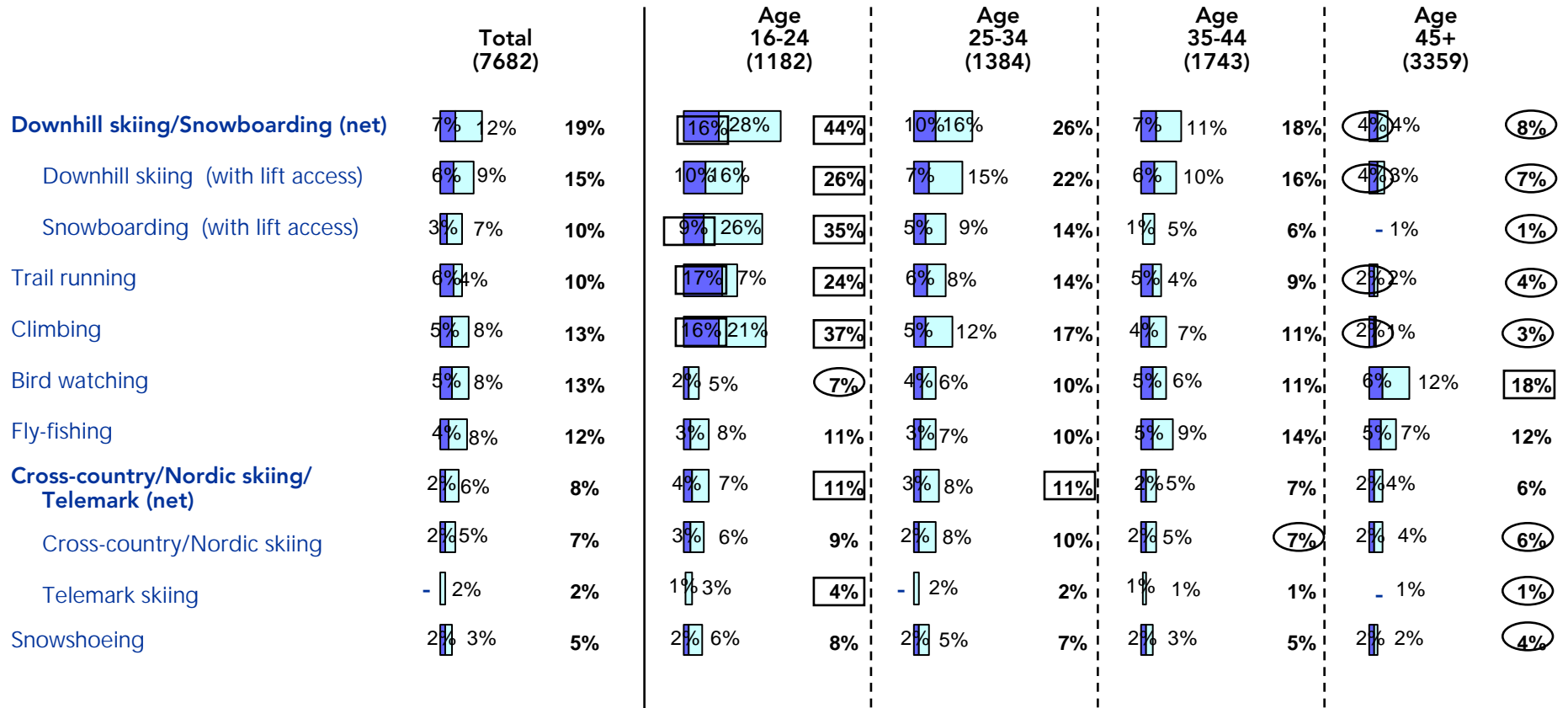




■ Participated in past 2 years
 □ Plan to participate in next 2 years



Total Participation (Continued)

General Population



 Participated in past 2 years
 Plan to participate in next 2 years

Understanding the lifecycle of outdoor activities is essential to identifying the key areas of opportunity.

Outdoor activities are typically started at a young age and then at some point in their mid-twenties, their lifestyle becomes too busy and they have to stop for a period of time. Most start again because they miss the activity, however, a significant portion never start again.

- 90% of participants started an outdoor activity between the ages of 5 and 18.
- Biking and camping appear to have the greatest longevity.
 - Bikers have been biking for almost 29 years.
- Age 25-44, single, couples, or with kids, participate in outdoor activities less overall than any other age groups.
- 16-24 year olds participate in outdoor activities most often among the age groups.

Since once participants begin participating in an outdoor activity, there is a high probability that they will continue to participate in at least one outdoor activity, it will be most beneficial to attract new participants at a young age. "People you know" is the biggest influencer in attracting new participants to an outdoor activity.

- Parents/guardians/family members is the number one influencer mentioned (41%).
- Followed by friends and peers who are already active in the activity (33%) or who want to try the activity (31%).

Actions considered most effective in encouraging people to experience outdoor activities:

Among Youth

Turn off the TV
Affordable gear and equipment
Organized school programs/clubs/athletics
Parent organized activities
Boy Scouts
Greater number of parks
Closer location/easier access

Among Adults

Turn off the TV
Affordable gear and equipment
Organized work/employer-sponsored activities
Greater number of parks
Closer location/easier access

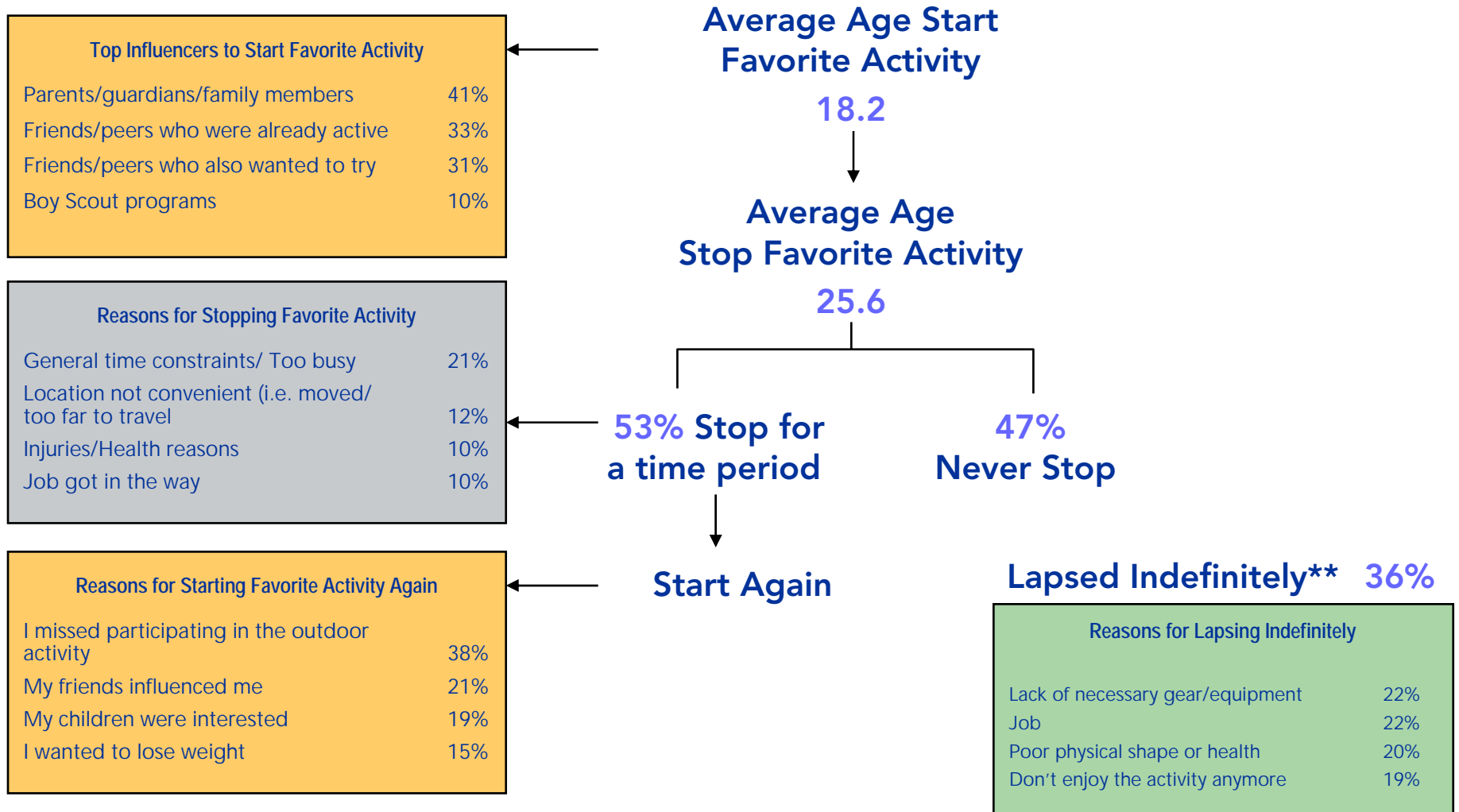
The key attitudes that correlated with increase in frequency revolve around:

- Ingrained behavior – have always done it
- Exercise
- The challenge
- Having time to participate
- Enjoying the outdoors

Older age groups have a job and more disposable income and therefore tend to spend more on outdoor activities than the younger (16-24 year olds). The key attitudes that correlate with increase in spending revolve around:

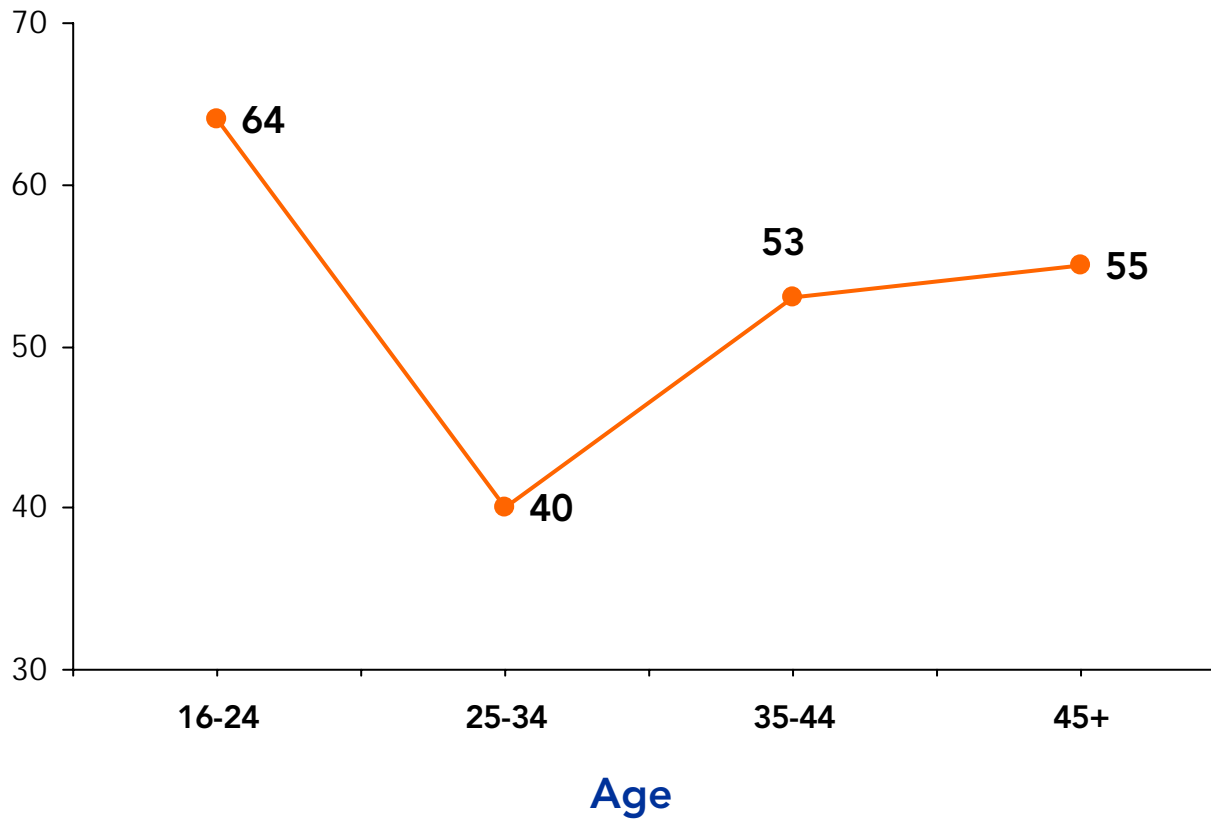
- Participation in extreme activities
- Outdoor enjoyment
- Ingrained behavior
- Exercise

Lifecycle

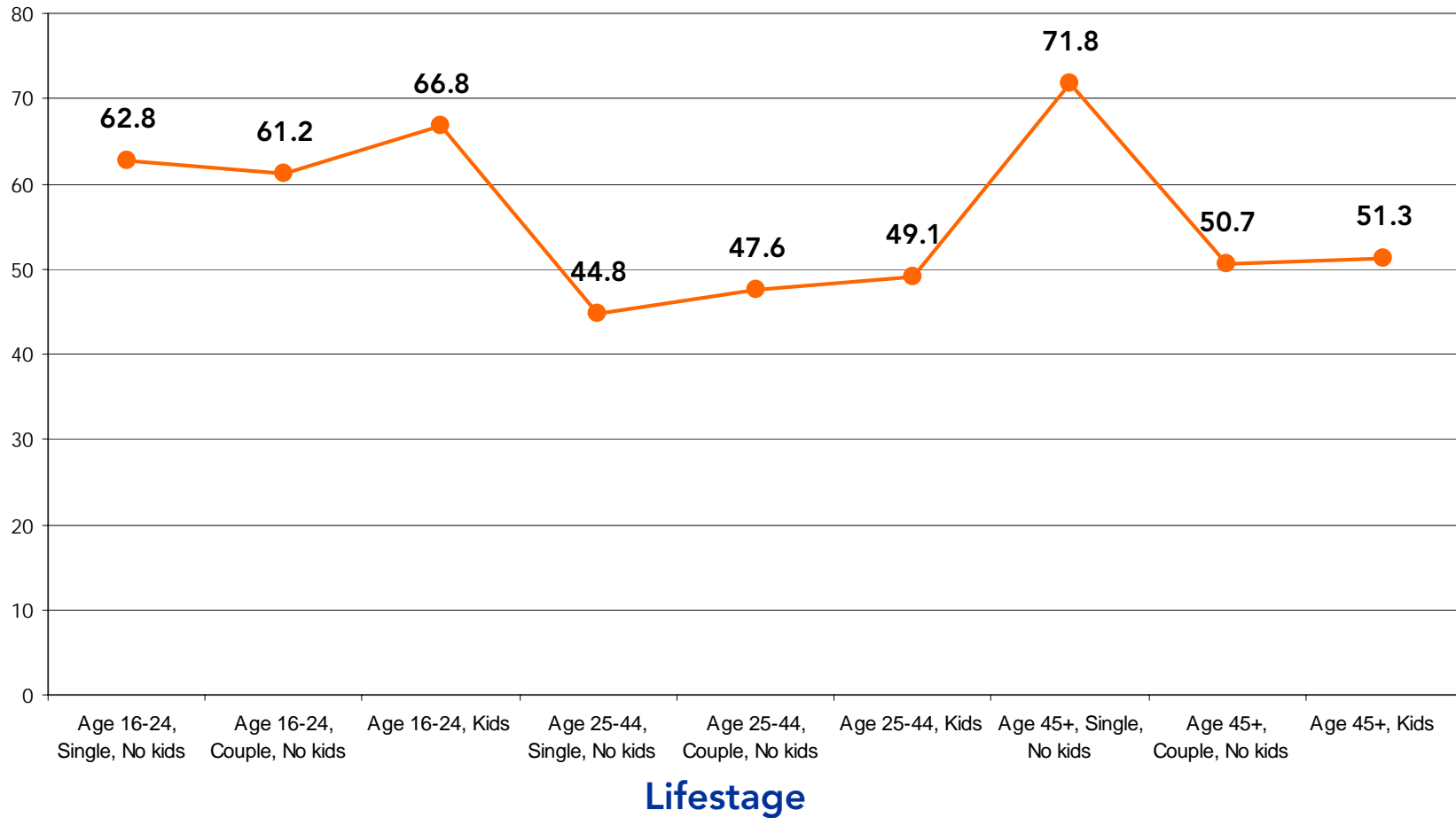


** Based on ever participating in a sport

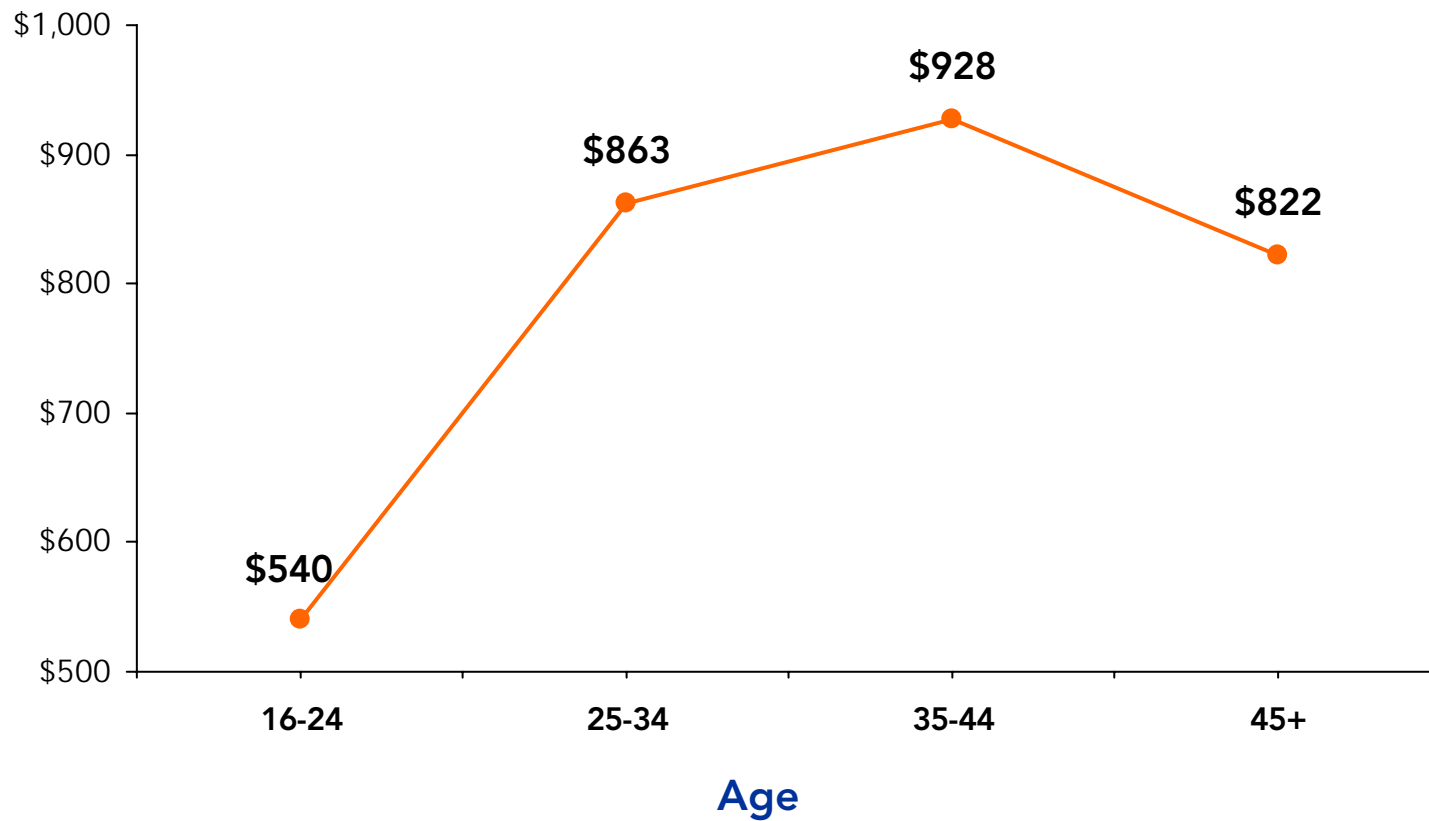
Average Number of Times Participated in Any Outdoor Activity in Past 2 Years



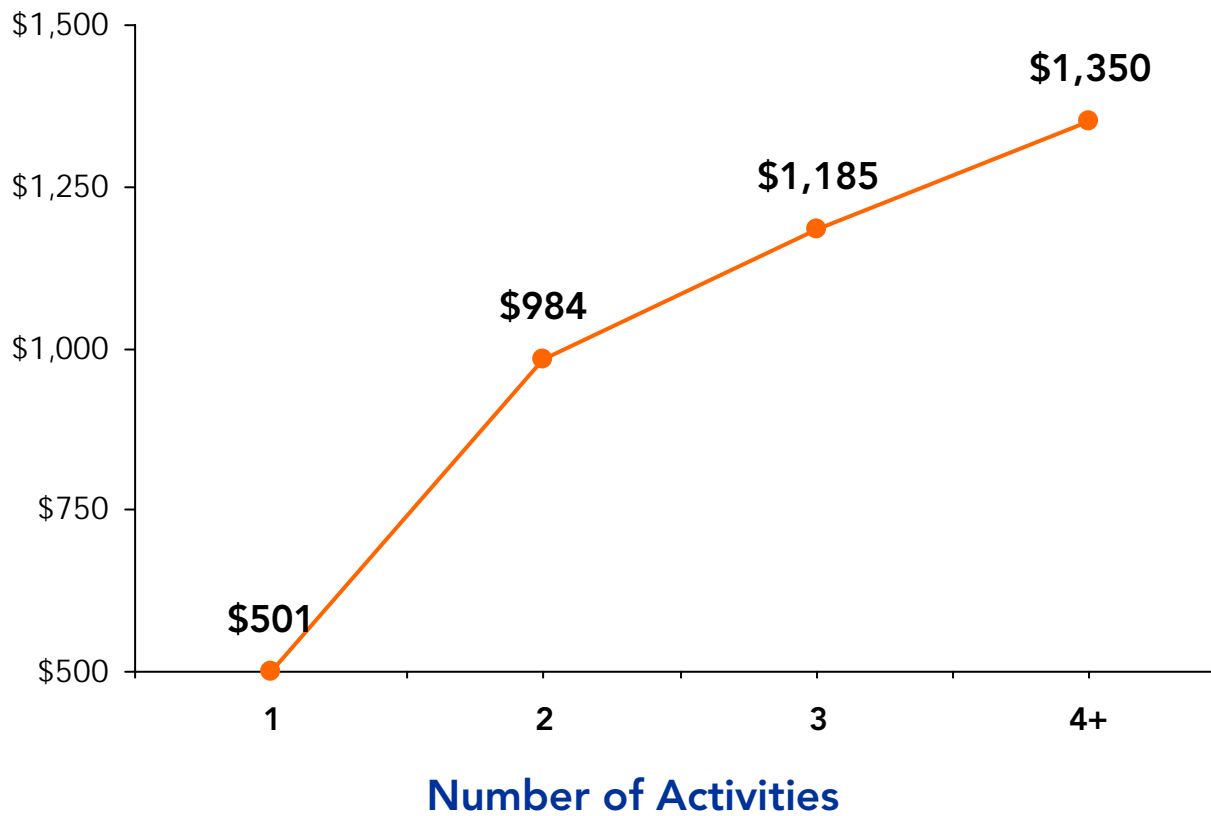
**Average Number of Times Participated
in Any Outdoor Activity in Past 2 Years**



Average Amount Spend on Outdoor Activities

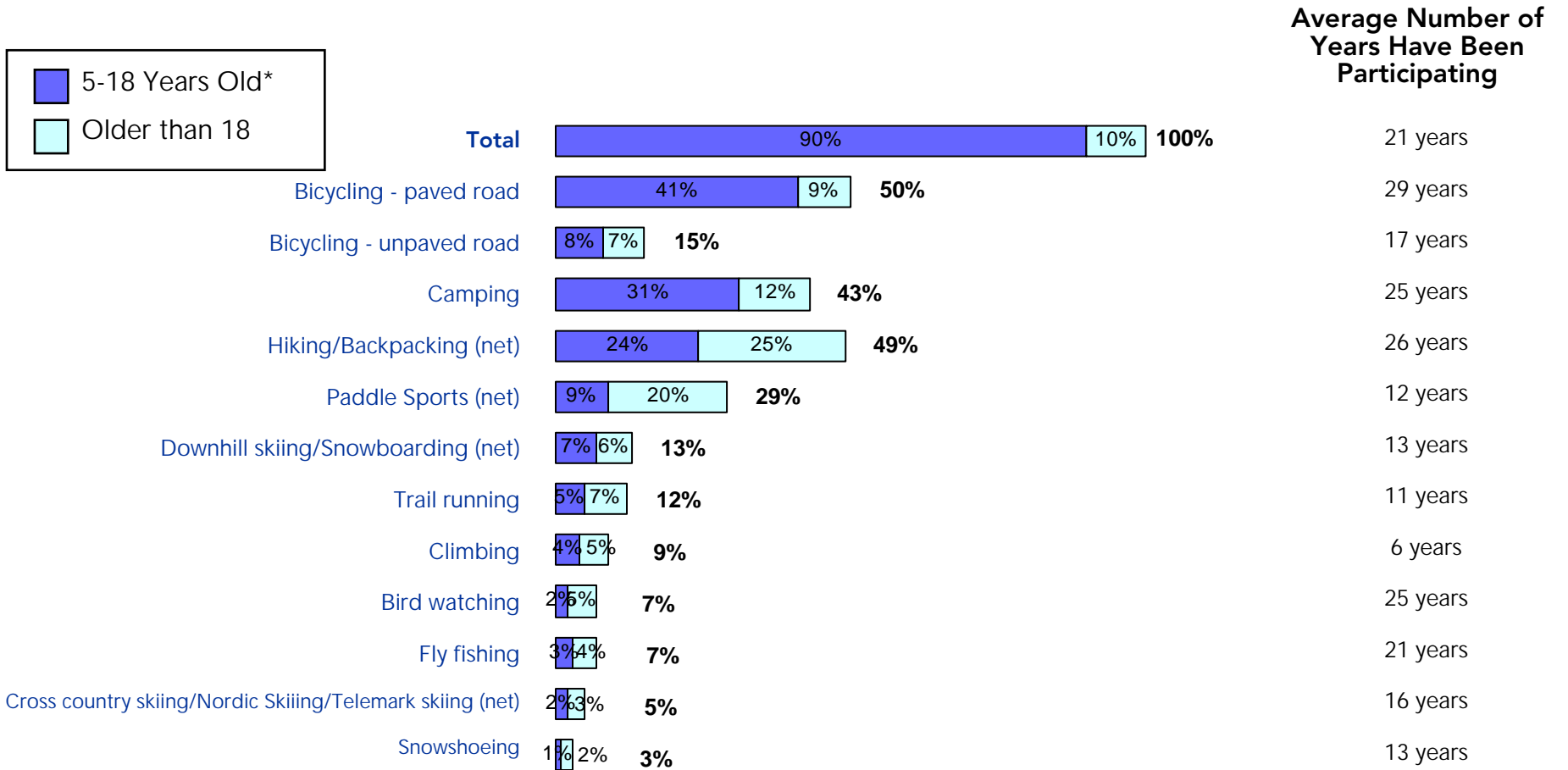


Spending By Number of Activities Participate In





When Started Activity – Among Participants



*Participated 5-18 and currently participate



Favorite Activity Among Participants

Reasons for Starting

	%
Parents/Guardians/Family members	41
Friends/peers who were already active in it	33
Friends/peers who also wanted to try it	31
Boy Scouts programs, camps	10
Church group or other religious organization	8
School-related clubs/athletics	6
Girl Scouts programs, camps	6
Books	6
Media – newspaper, magazine, Internet, etc.	5
Personal Interest (Volunteered)	4
Camps not affiliated with organizations such as Scouts, YMCA	3
Movies	3
YMCA/YWCA programs, camps	2
Boys & Girls Clubs programs, camps	2
Camp Fire programs, camps	2
Community organization/club not affiliated with school –Rainbow Girls, Mountaineering clubs, etc.	2
Retailer-sponsored events, such as a local sporting good store clinic or race	2
Local Gym, gym-sponsored events or programs, including indoor climbing center	2
Outdoor educational programs such as Outward Bound	1
A sports icon	1
Other	6
Nothing (Volunteered)	3

Reasons for Stopping

	%
General time constraints/Too busy	21
Location not convenient (i.e. moved/ too far to travel)	12
Job got in the way	10
Injuries/Health reasons	10
School commitments	8
Lost interest/desire	7
Pregnancy/birth of a child	6
Family commitments	6
Do not have the equipment	5
Money issues	4
Got married	4
Entered the military	4
Got a drivers license/vehicle	4
Participated in other activities instead	4
Could not find anyone to do activity with	3
No opportunity	1
Age/Felt too old	1
Other	11
No reason for stopping	1
Not sure	1

Reasons for Starting Again

	%
I missed participating in the outdoor activity	38
My friends influenced me	21
My child(ren) was interested	19
I wanted to lose weight	15
I lost weight/Improved physical shape	11
My spouse/Family Member (Volunteered)	7
I retired from working full time	4
I now have more money to invest in it	4
Doctor's recommendation	3
Church club/activity	3
Other social club/activity	3
My parents/guardians influenced me	3
Boy Scouts	3
Camp Fire	2
Between jobs	2
School club/activity	1
Girl Scouts	1
My parents/guardians forced me to	-
Boys and Girls Club	-
Other	20
No influences (Volunteered)	2



Reasons for Stopping an Activity Indefinitely*



*Among those who lapsed for any activity





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Actions Considered Effective in Encouraging Youth to Experience Outdoor Activities

	Participants					
	Total (2054) %	Age 16-24 (498) %	Age 25-34 (380) %	Age 35-44 (397) %	Age 45+ (779) %	Have Children (897) %
Just turning off the TV	55	55	58	57	53	54
Organized school programs/clubs/athletics	51	50	55	47	52	50
Affordable gear and equipment	48	48	54	48	45	50
Parent-organized activities	45	33	53	51	46	43
Boy Scouts sponsored programs	41	36	41	43	44	38
Greater number of local parks/nearby recreation areas	38	42	42	37	34	38
Closer access to outdoor areas	38	48	40	31	34	37
YMCA/YWCA sponsored programs	37	30	39	36	40	32
Boys & Girls Clubs sponsored programs	35	28	45	32	36	31
Organized religious or church groups	34	31	33	32	38	34
Girl Scouts sponsored programs	34	27	36	33	37	30
More free time for children	29	35	31	28	23	34
Local clubs such as a cycling association or hiking club	27	23	30	22	32	24
Programs sponsored by outdoor-oriented retail stores	22	22	30	19	20	22
Camp Fire sponsored programs	22	16	23	26	23	21
Programs sponsored by fitness gyms/climbing gyms	21	22	25	17	20	20
Organized work/employer-sponsored programs	19	16	21	21	19	20
Local service organizations not affiliated with any of the listed organizations, such as Rainbow Girls or Jr. League	15	16	20	12	14	15
Other	2	1	2	2	3	2



Activities or Actions Effective at Encouraging Adults to Participate

	Participants				
	Total (2054) %	Age 16-24 (498) %	Age 25-34 (380) %	Age 35-44 (397) %	Age 45+ (779) %
Just turning off the TV	60	57	60	58	62
Affordable gear and equipment	53	61	55	54	44
Organized work/employer-sponsored programs	46	49	48	43	46
Closer access to outdoor areas	41	46	44	40	38
Greater number of local parks/nearby recreation areas	40	44	40	39	39
Organized religious or church groups	32	33	28	30	34
Local clubs such as a cycling association or hiking club	28	27	26	28	29
Programs sponsored by fitness gyms/climbing gyms	28	34	33	25	22
Programs sponsored by outdoor-oriented retail stores	24	23	26	28	21
YMCA/YWCA sponsored programs	19	16	18	21	20
Organized school programs/clubs/athletics	15	15	21	15	12
Local service organizations not affiliated with any of the listed organizations, such as Rainbow Girls or Jr. League	9	7	12	7	11
Other	5	3	5	7	5



This document is the executive summary of *Exploring the Active Lifestyle*, an OIF consumer outreach report. The full 180 page report goes in to detail on specific activity profiles. Companies that contribute \$5,000 and above to Outdoor Industry Foundation receive the full report. For further information or to make a donation, please contact Kandice King at 303.444.3353 ext. 204 or kking@outdoorindustry.org